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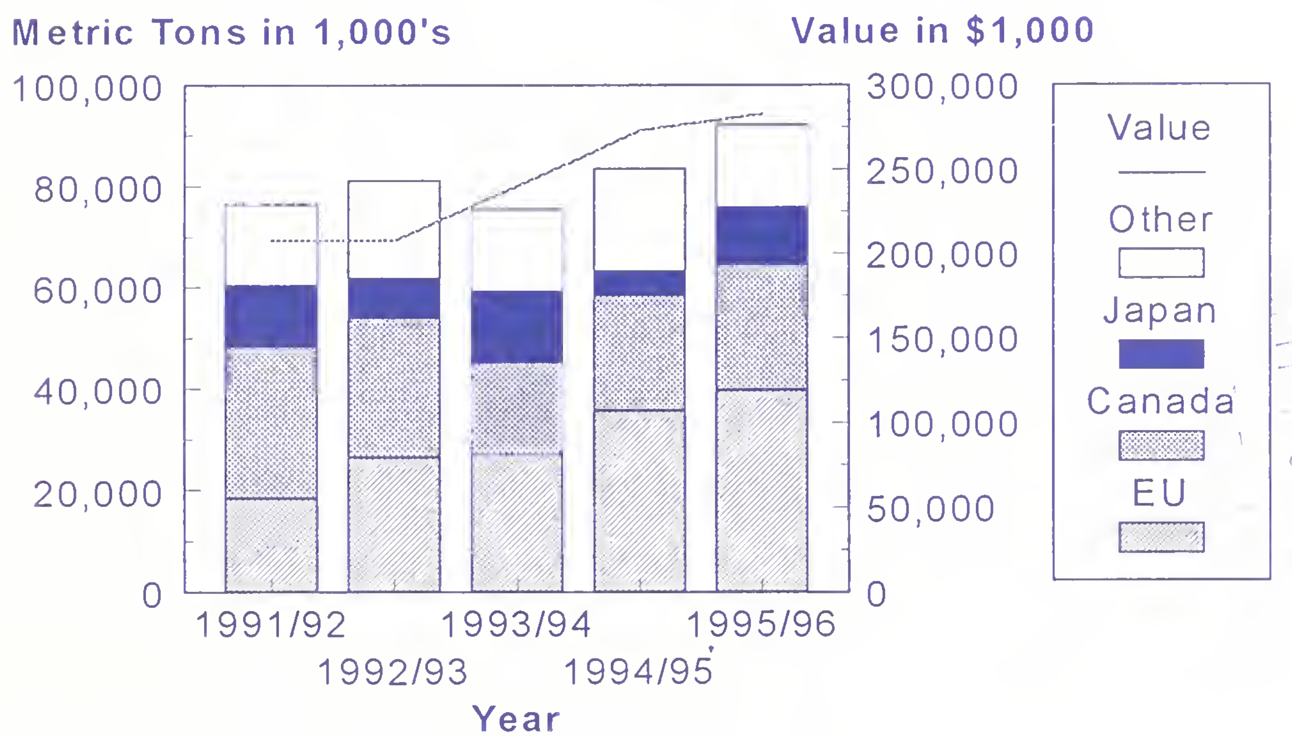
USDA United States Department of Agriculture

Foreign Agricultural Service

Circular Series
FHORT 02-97
February 1997

World Horticultural Trade and U.S. Export Opportunities

Orange Juice Exports Reach Record Value and Volume



Source: U.S. Bureau of Census
Marketing year is December -November

U.S. exports of orange juice in marketing year 1995/96 (December-November) reached a record 92,127 metric tons (65 degrees brix), 10 percent above the previous year's volume. Export value in 1995/96 reached a record $283 million, 4 percent above the previous year's value. Florida accounts for most of the U.S. orange juice exports. The orange juice market is experiencing an upward trend, due to increased demand for higher quality single strength juice and strong marketing efforts by U.S. companies. Even though the U.S. product is more expensive than the Brazilian product, the quality is superior and consumers are willing to pay for the "fresh squeezed" taste associated with U.S. orange juice. Strong U.S. marketing efforts include opening distribution channels and offering different product forms such as pasteurized products, plastic bottles, tetrabrik and juice packed cartons. The European Union, Canada, and Japan are the major markets, accounting for 43, 27, and 12 percent respectively of total 1995/96 U.S. sales. The European Union has become a growth market for U.S. orange juice as sales reached a record 39,753 tons in 1995/96, 11 percent above the previous year and more than double the level of 5 years ago. U.S. exports to Japan recovered this past season, boosted by expanded sales of higher quality single strength juice, which can compete with lower priced Brazilian frozen concentrate juice. Sales to Canada continue strong.

Approved by the World Agricultural Outlook Board/USDA

For further information, contact:
U.S. Department of Agriculture
Foreign Agricultural Service
Horticultural and Tropical Products Division
AG Box 1049
Washington, DC 20250-1049

Telephone: 202-720-6590
Fax: 202-720-3799

Frank J. Piason, Director
Robert B. Tisch, Deputy Director for Marketing
Howard R. Wetzel, Deputy Director for Analysis

ANALYSIS

Sam Rosa	202-720-6086	Fresh deciduous fruit, apple juice, olives, stone fruit, and CBI
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Bill Janis	202-720-0897	Fresh and processed potatoes, tree nuts, and tropical fruits
Bob Knapp	202-720-4620	Canned deciduous fruit and kiwifruit
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, melons, bananas, nursery products, and cut flowers
Debra A. Pumphrey	202-720-8899	Coffee, cocoa, tea, spices, essential oils, ginseng, and trade forecasts
Stephanie Riddick	202-720-9792	Dried fruit, avocados, beer, hops, berries, and circular coordinator
Joe Somers	202-720-2974	Situation and outlook group leader, processed citrus, trade forecast coordinator, FAO citrus liaison, and circular editor
Debbie Seidband	202-720-6877	Sugar, honey, and fresh citrus
Yvette Wedderburn Bomersheim	202-720-9903	Wine and brandy, table grapes, GSM-102 export credits, NAFTA coordinator and supplier credits

MARKETING

Sarah Hanson	202-720-0911	Deciduous fruit
Ted Goldammer	202-720-8498	Fresh citrus and products, hops, berries, wine, brandy, and potatoes
Pamela McKenzie	202-720-8495	Canned deciduous fruit, grape juice, cranberry juice, kiwifruit, and honey
Stacey Peckins	202-720-5330	Tree nuts, papaya, foliage, plants
Steve Shnitzler	202-720-8495	Dried fruit, avocados, tomatoes, vegetables, and ginseng

For subscription questions or address changes, please contact Robertha McLean, 202-720-9445.

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Export Summary

U.S. exports of horticultural products to all countries in November reached $927.6 million, up 6 percent from the same month a year earlier. Ten out of 15 categories of horticultural exports registered increases. Categories with the most significant increases in November were canned vegetables (up $8.0 million or 15 percent); fresh vegetables (up $7.7 million or 10 percent); frozen vegetables (up $4.0 million or 12 percent); wine (up $3.9 million or 18 percent); and miscellaneous products (up $35.4 million or 18 percent). The categories with the most significant decreases were tree nuts (down $3.2 million or 3 percent); canned fruit (down $3.1 million or 16 percent); and hops and products (down $2.7 million or 20 percent). During the first 2 months (October-November) of fiscal year (FY) 1997, the total value of U.S. horticultural exports was $2.0 billion -- 9 percent above the same period last year.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER - SEPTEMBER YEAR
NOV 1996

NAME	QUANTITY					VALUES (1000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MON LAST YR	CURR MON CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH CITRUS MT										
GRAPEFRUIT	54,738	41,441	90,642	75,165	497,339	28,447	22,153	48,086	38,936	258,858
LEMONS	10,734	12,978	21,068	22,523	132,269	10,079	14,942	23,360	24,057	114,653
ORANGES, INCL. TM	23,656	27,615	39,880	38,605	513,630	15,188	15,871	24,593	22,384	287,699
OTHER CITRUS	3,772	4,916	5,624	6,943	30,208	3,080	4,216	4,586	6,072	24,774
Subtotal:----	92,901	86,949	157,213	143,236	1,173,446	56,794	57,181	100,625	91,449	685,985
FR. FRUIT, NON-CIT MT										
APPLES	72,921	92,405	131,444	158,470	564,953	45,291	55,504	82,587	95,483	371,337
AVOCADOS	1,027	639	2,590	1,556	10,090	733	447	1,827	1,225	12,342
CHERRIES SWT &TRT	934	43	1,739	375	34,702	735	138	1,436	529	130,807
GRAPES	36,265	27,302	78,800	67,941	240,097	48,980	43,443	98,152	100,386	303,291
KIWIFRUIT	452	572	627	976	5,315	606	700	872	1,199	7,378
MELONS	7,064	6,457	16,268	15,804	223,273	3,683	3,180	8,098	7,652	80,607
PAPAYA	640	615	1,348	1,216	8,274	1,455	1,478	2,873	2,931	19,100
PEACHES & NECTRNS	96	393	1,133	1,976	74,822	86	325	950	1,586	71,900
PEARS	28,195	19,185	49,405	46,687	144,426	13,682	12,187	25,550	27,402	84,460
PLUMS/PRUNES	98	286	1,759	1,802	67,193	113	360	1,829	1,746	60,698
STRAWBERRIES	1,601	1,020	6,175	4,921	53,693	5,134	3,219	14,805	12,291	91,674
OTHER NON-CITRUS	5,153	6,064	10,984	13,268	47,787	4,368	6,112	11,145	13,447	62,554
Subtotal:----	154,445	154,979	302,272	314,992	1,474,624	124,867	127,093	250,123	265,876	1,296,148
CAN/PREP FRUIT MT										
CHERRIES, TART CN	418	249	758	582	6,270	475	331	824	827	7,406
FRUIT MIXTURES	3,268	2,212	6,341	5,314	26,876	3,740	2,604	7,261	6,362	31,614
MARACHINO CHERRY	2,194	478	2,517	901	7,756	2,516	1,070	3,148	1,927	13,925
PEACHES, CANNED	1,774	1,144	3,636	3,287	17,777	1,600	1,121	3,290	3,357	17,250
PINEAPPLE, CANNED	240	390	615	552	3,339	200	368	521	525	3,113
OTHER CANNED FRUI	3,579	3,745	7,444	7,897	45,596	4,261	4,454	8,826	9,475	52,142
OTHER PREP/PRESER	5,806	4,998	11,719	11,897	77,272	6,460	6,161	13,570	14,508	78,708
Subtotal:----	17,279	13,216	33,029	30,429	184,885	19,252	16,109	37,440	36,980	204,158
ORIEO FRUIT MT										
PRUNES, ORIED	4,474	5,654	12,402	12,933	62,548	10,369	11,915	28,381	27,317	139,073
RAISINS, DRIED	9,404	9,896	23,076	25,908	118,824	16,543	17,662	39,519	45,171	200,420
OTHER DRIED FRUIT	3,331	1,920	6,211	4,739	22,411	6,578	5,981	14,109	14,172	55,474
Subtotal:----	17,209	17,470	41,690	43,580	203,783	33,489	35,558	82,009	86,660	394,967
FROZEN FRUIT MT										
8LUE8ERRIES, FROZ	1,014	509	1,952	1,519	13,785	1,549	970	3,029	2,951	18,713
STRAWBERRIES, FRO	2,129	1,839	3,198	3,084	21,890	2,767	2,392	4,193	3,961	28,346
OTHER FROZEN FRUI	2,765	1,850	6,026	3,169	28,612	2,839	2,484	6,861	4,475	36,707
Subtotal:----	5,908	4,198	11,177	7,773	64,287	7,155	5,846	14,083	11,387	83,766
FRUIT/VEG JUICES KL										
GRAPEFRUIT JU, CN	3,014	3,313	6,029	8,145	63,393	2,235	2,295	4,472	5,230	43,790
ORANGE JUICE, CON	15,225	19,712	34,843	35,449	326,175	9,807	11,622	20,476	23,563	163,945
ORANGE JUICE, NOT	9,301	15,067	20,410	29,089	152,862	6,870	10,760	15,026	20,292	109,185
OTHER JUICES	53,567	35,582	102,288	77,815	489,240	33,661	25,693	65,995	53,437	348,225
Subtotal:----	81,107	73,675	163,571	150,498	1,031,670	52,573	50,369	105,969	102,522	665,145
FRESH VEGETABLES MT										
ASPARAGUS, FR, CH	133	155	252	261	14,344	316	436	629	713	51,666
8ROCCOLI	9,264	9,434	17,466	16,901	129,396	5,028	6,397	10,484	11,335	84,418
CAULIFLOWER	9,383	7,807	16,804	16,829	107,457	5,619	5,303	10,228	10,913	71,619
CELERY	10,270	10,440	17,376	18,219	116,728	3,945	4,068	6,760	6,595	38,886
LETTUCE, FR CHLO	25,836	26,512	49,456	52,999	286,294	10,001	14,503	21,140	27,137	132,876
ONIONS	29,325	19,480	52,077	54,546	224,447	8,548	6,172	14,810	17,780	69,739
PEPPERS	4,256	5,366	8,786	10,198	58,504	3,876	4,709	7,173	8,431	46,467
TOMATOES	10,388	12,952	22,724	24,756	131,285	9,283	10,769	17,782	19,807	100,428
OTHER VEGETA8LES	42,704	47,993	84,365	94,625	722,921	28,578	30,540	58,209	68,873	383,227
Subtotal:----	141,561	140,139	269,307	289,334	1,791,376	75,195	82,896	147,213	171,583	979,327
VEG CANNEO MT										
KETCHUP	3,450	4,078	6,862	7,446	41,143	2,603	2,956	5,107	5,459	30,851
SWEET CORN, CANNE	14,190	19,361	27,428	34,513	168,615	11,190	16,438	21,548	28,439	136,983
TOMATO PASTE	9,738	9,530	22,058	21,368	101,059	6,787	6,886	16,715	16,170	77,393
TOMATO SAUCE	5,728	6,747	13,175	15,483	84,053	5,337	6,596	12,805	14,757	79,868
OTHER CAN VEG	21,897	22,541	41,397	45,841	253,825	27,070	28,093	52,174	56,861	315,358
Subtotal:----	55,004	62,257	110,919	124,651	648,696	52,987	60,969	108,349	121,687	640,453
FROZEN VEGETABLES MT										
FROZEN FRENCH FRY	29,040	33,550	55,891	65,192	350,487	21,510	24,793	41,385	48,283	256,185
FZN SWT CORN	5,550	5,767	11,763	10,910	59,253	4,807	4,941	9,922	9,565	50,829
OTHER POT FZN	1,595	2,608	3,288	7,575	20,772	1,332	1,949	2,634	4,686	17,868
OTHER FZN VEG	6,704	6,692	12,898	12,017	71,480	6,365	6,356	12,217	11,314	63,306
Subtotal:----	42,890	48,617	83,839	95,695	501,991	34,014	38,038	66,158	73,849	388,188
VEG, OEHYO MT										
GARLIC OEHYO.	644	784	1,412	1,954	9,622	1,461	1,730	3,274	4,094	21,690
ONIONS, OEHYD.	2,418	2,938	5,090	5,710	30,465	5,575	7,302	12,130	13,709	70,479
POTATOES, DEHYD	5,122	4,122	9,112	7,669	50,241	4,902	4,260	9,083	8,004	57,054
OTHER DEHYD VEG	4,688	4,296	8,933	10,792	55,708	6,501	6,355	13,048	14,356	82,287
Subtotal:----	12,871	12,139	24,547	26,124	146,037	18,438	19,646	37,535	40,164	231,509
TREE NUTS MT										
ALMONOS, UNSHLO	2,645	3,000	5,197	6,542	19,609	6,874	7,411	13,177	15,787	47,853
PISTACHIO, UNSHLO	1,778	725	3,467	1,604	10,231	6,160	2,955	11,728	6,917	36,474
WALNUTS, SHLD	3,796	3,615	5,914	6,348	21,139	11,120	11,381	17,479	20,703	74,538
WALNUTS, UNSHLO	17,128	10,149	49,155	46,390	62,144	33,169	21,061	94,852	99,560	121,252
OTHER NUTS	9,352	7,399	21,494	16,721	73,592	27,232	21,227	55,932	45,829	206,474
ALMONOS, SH/PREP	24,117	15,157	58,228	44,088	282,227	60,677	78,028	151,299	217,350	894,225
Subtotal:----	58,816	40,044	143,455	121,694	468,942	145,233	142,064	344,468	406,146	1,380,816
NUSERY PROOUCTS M										
CUT FLOWERS	0	0	0	0	0	3,391	3,853	7,104	8,001	46,529
OTHER NURSERY	0	0	0	0	0	14,461	14,073	26,910	26,968	154,613
Subtotal:----	0	0	0	0	0	17,852	17,926	34,014	34,969	201,142
HOPS & PROOUCTS MT										
HOP EXTRACT	432	436	663	612	3,751	7,703	6,083	11,523	9,584	60,224
HOP PELLETS	682	804	1,128	1,136	5,549	3,596	3,505	5,937	6,109	30,441
HOPS, NFSP	315	127	1,009	480	2,860	1,818	842	5,060	2,719	16,847
Subtotal:----	1,429	1,366	2,800	2,227	12,160	13,117	10,429	22,520	18,413	107,512
WINE KL										
GRAPE WINES	11,079	12,423	24,277	29,368	157,116	20,721	24,627	44,198	56,760	287,482
OTHER WINE PROO	1,388	1,199	2,461	2,502	12,896	1,485	1,491	2,784	3,320	17,212
Subtotal:----	12,467	13,621	26,738	31,871	170,011	22,206	26,119	46,982	60,080	304,694
MISCELLANEOUS M										
8EER & 8EVERAGES	70,070	62,159	144,816	114,583	744,403	43,037	37,061	87,401	71,107	452,774
EOI8LE PREPARATIO	16,300	18,798	33,908	38,122	208,291	58,581	76,067	116,965	163,676	813,101
GINSENG	216	194	540	469	893	21,028	15,060	48,940	34,791	77,527
POTATO CHIPS	5,576	4,400	11,357	9,946	59,922	16,262	11,845	32,468	25,755	166,159
OTHER MISC	0	0	0	0	0	63,062	97,342	151,059	178,462	955,163
Subtotal:----	92,162	85,551	190,621	163,120	1,013,509	201,970	237,375	436,834	473,791	2,464,723
Grand Total:						875,142	927,621	1,834,322	1,995,556	10,028,533

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER - SEPTEMBER YEAR
NOV 1996

NAME	QUANTITY					VALUES (1000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MON LAST YR	CURR MON CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT MT										
APPLES	9,692	13,130	27,694	34,620	175,491	3,873	4,654	8,903	10,363	103,231
AVOCADOS	5,273	8,125	13,699	14,610	23,118	4,461	7,768	12,183	13,810	20,455
BANANAS	293,252	301,815	623,306	613,595	3,782,707	82,493	86,674	176,868	177,822	1,093,212
CANTALOUPE	18,267	15,553	20,642	21,201	333,902	5,692	5,987	6,471	6,911	106,031
GRAPES	274	272	549	2,470	341,098	408	288	778	877	344,799
KIWIFRUIT	443	1,415	1,012	2,435	37,301	409	1,207	986	2,298	24,039
MANGOES	2,127	3,987	2,871	6,571	166,058	3,041	3,573	4,103	6,890	100,039
PEACHES	169	625	177	645	41,287	184	724	190	751	31,085
PEARS	730	747	1,102	979	57,371	2,224	1,937	3,485	2,579	34,106
PINEAPPLES	10,462	11,443	19,952	23,085	128,547	3,559	5,197	6,855	10,596	47,758
STRAWBERRY	674	801	688	823	30,048	1,475	1,743	1,515	1,766	54,522
OTHER MELONS	20,017	19,281	27,141	31,182	327,524	5,180	6,195	7,426	10,177	92,781
OTHER FRUIT	40,418	44,759	95,672	101,845	538,529	16,739	23,228	42,345	50,512	263,393
Subtotal:----	401,798	421,953	834,505	854,060	5,982,982	129,737	149,176	272,109	295,352	2,315,450
DRIED FRUIT MT										
DRIED APRICOTS	2,423	1,440	3,513	2,637	14,069	5,257	3,948	7,515	6,919	30,639
DRD FIGS & PST	944	503	1,607	1,425	5,044	1,502	1,087	3,106	3,247	7,188
OTHER DRIED FRUI	2,570	2,260	4,827	4,420	25,302	3,537	3,983	6,729	7,954	39,682
Subtotal:----	5,937	4,203	9,947	8,482	44,416	10,296	9,018	17,350	18,120	77,510
FROZEN FRUIT MT										
FZN BLUEBERRIES	814	1,038	1,738	2,744	10,472	1,014	2,107	2,113	5,392	16,085
FZN STRAWBERRIES	512	164	661	395	21,148	366	180	616	474	17,669
OTHER FZN FRUIT	1,635	2,220	3,464	4,728	33,720	1,965	2,441	4,105	5,486	38,421
Subtotal:----	2,960	3,422	5,863	7,867	65,340	3,345	4,728	6,833	11,352	72,175
CANNED/PREP FRUIT MT										
CANNED OLIVES	7,119	5,936	15,136	12,358	72,282	16,895	15,563	35,372	32,925	181,991
CANNED ORANGES	1,625	3,280	2,941	6,785	59,849	1,803	3,365	3,191	6,915	64,148
CANNED PEACHES	1,481	3,521	3,361	8,049	17,062	1,015	2,272	2,290	5,238	11,726
CANNED PINEAPPLE	26,939	16,926	55,539	41,432	306,266	14,585	11,950	30,174	29,331	195,435
MIXED FRUIT	3,646	3,712	5,668	5,805	46,109	3,238	3,492	5,227	5,909	42,609
PREP/PRES FRUIT	6,194	7,269	12,636	13,408	70,663	7,895	8,518	16,881	16,112	88,398
OTHER CANNED FRU	4,816	4,486	9,679	11,123	63,644	6,356	6,294	13,185	14,336	78,573
Subtotal:----	51,820	45,131	104,960	98,960	635,875	51,786	51,453	106,321	110,766	662,879
FRT&VEG JUICE SSE KL										
APPLE JUICE	57,919	99,011	119,716	161,134	856,697	24,547	31,518	46,365	54,851	327,267
FCOJ	91,839	144,404	122,159	273,207	816,744	21,438	32,791	28,477	64,109	215,338
GRAPE JUICE	13,078	14,918	27,053	34,909	218,866	3,692	5,315	7,332	11,973	62,896
PINEAPPLE JUICE	27,049	17,585	50,937	45,599	323,038	5,819	5,344	10,347	12,925	85,004
OTHER JUICES	9,748	17,601	24,199	35,136	238,032	8,054	9,993	16,433	20,225	139,434
Subtotal:----	199,633	293,518	344,065	549,985	2,453,377	63,551	84,961	108,954	164,083	829,939
FRESH VEGETABLES MT										
GARLIC	456	217	991	844	22,438	544	352	1,104	1,271	27,212
ASPARAGUS	3,463	3,849	6,769	7,762	33,333	5,976	6,420	11,138	11,667	58,156
BELL PEPPER	9,100	9,965	13,738	15,186	165,549	10,288	12,763	15,232	19,215	147,926
CARROTS	14,512	13,313	26,660	25,603	101,943	3,366	3,044	6,443	5,648	24,298
CHILI PEPPER	5,873	6,120	14,805	15,750	104,009	4,350	2,124	8,018	4,930	51,477
CUCUMBERS	32,179	37,056	38,574	46,946	295,907	8,077	11,448	9,879	15,642	115,608
ONIONS	11,856	14,632	18,024	24,507	266,779	16,635	13,199	22,395	21,786	146,632
POTATOES	40,236	24,343	77,215	49,538	489,908	8,164	4,400	14,788	9,775	98,581
SQUASH	15,729	17,994	22,229	26,065	132,970	4,929	11,077	7,571	15,911	67,300
TOMATOES	33,757	38,096	63,494	75,233	724,621	21,957	26,407	40,663	51,737	679,977
OTHER FRESH VEG	33,089	30,734	58,940	56,058	435,237	18,637	17,939	32,450	31,684	234,033
Subtotal:----	200,251	196,319	341,438	343,492	2,772,695	102,922	109,173	169,680	189,266	1,651,200
CANNED/DEHYD VEGE MT										
CND ARTICHOKES	1,963	2,379	4,028	4,494	26,367	3,670	3,826	7,661	7,422	45,213
CND BAMBOO	3,372	2,976	8,424	6,502	27,392	3,304	2,806	8,090	6,074	27,056
CND MUSHROOMS	3,880	5,818	7,792	10,727	56,569	9,002	10,583	18,474	19,831	115,561
CND PIMIENTO	678	990	1,200	1,936	8,171	964	1,249	1,667	2,459	10,493
CND TOMATOES	3,734	5,697	9,056	12,452	48,630	1,763	2,444	4,015	5,478	20,491
CND WATERCHNUTS	1,120	1,084	2,332	2,700	39,633	764	1,233	1,711	2,911	31,746
TOMATO PST & SAU	1,983	2,366	6,439	4,579	34,204	2,137	2,140	5,611	4,951	31,648
DRIED MUSHROOMS	104	86	184	186	1,536	1,423	1,288	2,578	2,541	17,049
DRIED TOMATOES	508	757	1,017	1,878	6,106	1,880	2,829	3,831	6,961	23,027
OTHER DEHY VEG	8,208	18,322	18,682	30,530	128,049	8,442	14,211	18,065	26,612	128,352
OTHER CAN VEG	17,131	19,622	34,883	42,020	211,272	16,932	18,118	34,001	38,210	198,012
Subtotal:----	42,681	60,095	94,037	118,004	587,930	50,283	60,727	105,702	123,452	648,648
FROZEN VEGETABLES MT										
BROCCOLI FZN	17,904	14,779	33,175	30,826	181,663	10,208	9,645	19,149	19,682	102,188
CAULIFLOWER FZN	3,177	2,517	5,891	5,400	18,351	1,820	2,013	3,564	3,989	11,559
POTATO FZN	13,624	21,968	27,649	41,465	183,071	8,167	13,318	16,804	25,319	112,893
OTHER VEG FZN	10,585	11,749	45,272	27,924	208,908	8,448	10,022	17,360	21,608	104,601
Subtotal:----	45,290	51,014	111,987	105,615	591,994	28,643	34,998	56,876	70,598	331,241
TREE NUTS MT										
BRAZILS TOT	385	705	763	1,536	7,821	990	2,118	2,006	4,705	16,613
CASHEWS TOT	4,359	4,908	9,064	9,990	61,038	21,911	23,464	45,503	48,080	300,213
COCONUT	5,726	3,244	11,727	7,685	43,090	4,636	2,918	9,481	7,121	35,895
PECANS	4,981	5,281	7,027	6,812	24,814	9,106	6,762	13,601	10,806	53,623
OTHER NUTS	3,468	3,364	5,558	5,573	18,533	10,974	12,236	19,016	20,608	74,881
Subtotal:----	18,920	17,501	34,139	31,596	155,296	47,616	47,498	89,607	91,320	481,224
NURSEY PRODUCTS M										
CARNATIONS	111,479	109,049	205,983	191,426	1,278,692	10,757	9,987	19,296	16,759	129,577
CHRISTMAS TREES	1,629	1,653	1,633	1,655	2,126	14,356	14,644	14,372	14,658	18,094
CHRYSANTHEMUS	66,915	63,109	123,906	120,063	676,248	8,628	9,194	16,348	16,902	91,982
ROSES	54,624	61,513	117,438	132,537	829,234	10,561	11,509	22,246	24,349	184,874
TULIP BULBS	11,887	19,325	78,768	80,689	341,260	1,369	2,184	10,544	9,567	42,074
OTHER CUT FLOWER1,	0	0	0	0	0	13,428	13,096	27,249	27,142	186,542
OTHER NURSEY PRO	0	0	0	0	0	21,618	22,957	46,698	49,663	277,365
Subtotal:	246,534	254,649	527,728	526,370	3,127,560	80,716	83,572	156,753	159,041	930,508
HOPS & PRODUCTS MT										
HOPS & PELLETS	333	278	369	355	5,365	2,231	1,985	2,377	2,322	37,979
OTHER HOP PROD	1	1	1	1	503	20	20	38	25	3,699
Subtotal:----	334	279	370	357	5,867	2,251	2,005	2,415	2,347	41,678
WINE KL										
RED WINE	13,218	16,837	26,624	32,730	150,951	53,986	65,826	109,612	126,771	565,708
SPARKILING WINE	5,337	4,636	12,346	11,464	31,069	48,646	46,298	117,151	117,689	313,991
WHITE WINE	10,071	10,227	21,895	23,532	106,568	33,254	36,443	74,067	85,370	360,701
OTHER WINE PROD	2,664	5,871	6,434	13,781	47,705	8,101	14,784	20,033	34,871	119,764
Subtotal:----	31,289	37,571	67,299	81,507	336,294	143,988	163,351	320,862	364,700	1,360,163
MISCELLANEOUS KL										
BEER & BEVERAGES	126,289	115,154	254,495	254,131	1,565,134	111,589	103,561	223,152	228,709	1,365,034
OTHER MISC	0	0	0	0	0	101,925	110,764	211,121	240,404	1,307,570
Subtotal:----	126,289	115,154	254,495	254,131	1,565,134	213,514	214,325	434,272	469,114	2,672,604
Grand Total:						928,648	1,014,985	1,847,736	2,069,511	12,075,218

EXPORT NEWS AND OPPORTUNITIES

GSM-102 Credit Guarantee Program: No activity since last publication

The GSM-102 program makes available financing for the sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to three years. Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amounts due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

The following table presents FY 1997 allocations by country and product along with registrations through January 10, 1997, for various horticultural commodities and products. Repayment terms vary under the program, from 90 days to 3 years. *Cautionary information for use of the accompanying table: The table reflects only exporter applications for guarantees that have been entered into the GSM 102 computerized system. At any given time, exporter applications are in process, and not all of those received have been entered into the system. Moreover, all applications are initially entered into the system on a provisional basis until price reviews have been completed, the guarantee fee has been received, and the written guarantee has been issued. Thus, some applications now in the system may in the future be removed, and the commodity balances correspondingly increased.* For details on terms and authorizations, see the footnotes to the table.

Note: The GSM will consider requests to establish a GSM-102 program for a country or region or amend an authorized program to include horticultural commodities and products which are currently not eligible. (For further information on the GSM-102 program for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-9903).

Supplier Credit Guarantee Program: No activity since last publication

The new Supplier Credit Guarantee Program (SCGP) is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

Note: The GSM will consider requests to establish a SCGP for a country or region or amend an authorized program to include horticultural commodities and products which are currently not eligible. (For further information on the SCGP for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-9903).

FY 1997 GSM-102
CREDIT GUARANTEE COVERAGE 1/

Country/Commodity	Announced Allocation 12/ (In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance (In Millions of Dollars)
ANDEAN REGION 2/	200.0	48.7	151.3
Dried fruit 7/		0.0	
Fresh fruit 6/		0.0	
Frozen fruit		0.0	
Tree nuts 5/		0.0	
BRAZIL	75.0	14.1	60.9
Fresh fruit 6/		4.6	
Potatoes		0.0	
CENTRAL AMERICA REGION 4/	40.0	20.2	19.8
Potatoes		0.0	
CHINA	100.0	5.1	94.9
Fresh fruit (apples & cherries)		0.0	
Potatoes		0.0	
CZECH REPUBLIC	10.0	0.0	10.0
Fresh fruit 6/		0.0	
Potatoes		0.0	
EAST AFRICA REGION 11/	35.0	0.0	35.0
Potatoes		0.0	
EAST CARIBBEAN REGION 3/	50.0	21.1	28.9
Fresh fruit 6/		0.0	
EGYPT	100.0	71.1	28.9
Fresh fruit 6/		0.0	
Potatoes		0.0	
INDIA	15.0	0.0	15.0
Tree nuts 5/		0.0	
INDONESIA	100.0	41.3	58.7
Dried fruit 7/		0.0	
Fresh fruit 6/		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
MEXICO	500.0	403.8	96.2
Fresh fruit 6/		0.0	
Hops and Products		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
PAPUA NEW GUINEA	1.0	0.0	1.0
Canned vegetables		0.0	
POLAND	25.0	0.0	25.0
Potatoes		0.0	

FY 1997 GSM-102
CREDIT GUARANTEE COVERAGE 1/

Country/Commodity	Announced Allocation 12/ (In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance (In Millions of Dollars)
RUSSIA	**50.0**	**23.0**	**27.0**
Canned fruit 4/		0.0	
Canned vegetables 8/		0.0	
Dehydrated instant soup		0.0	
Fresh fruit 6/		0.1	
Fresh vegetables 9/		0.0	
Frozen vegetables		0.0	
Frozen concentrated orange juice		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
SLOVAKIA	**10.0**	**0.0**	**10.0**
Frozen concentrated orange juice		0.0	
SOUTHERN AFRICA REGION 10/	**50.0**	**0.0**	**50.0**
Potatoes		0.0	
TUNISIA	**30.0**	**0.0**	**30.0**
Tree nuts 5/			

1/ Coverage announced for FY 1997 as of January 10, 1997 as detailed in FAS Program Announcements (tel: 202-690-1621 for information); unless otherwise noted, terms are FOB, 90-days to 3 years. 2/ Barbados, Grenada, Guyana, St. Lucia, St. Vincent, and the Grenadines, Surinam, Trinidad and Tobago. 3/ Bolivia, Colombia, Ecuador, Chile, Peru, and Venezuela. 4/ Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama. 5/ almonds, pecans, pistachios, walnuts, Hazelnuts. 6/ Apples, apricots, avocadoes, blueberries, cherries, grapes, grapefruit, kiwifruit, lemons, melons, (watermelons, cantaloup, and honeydew), nectarines, oranges, pears, plums, peaches, raspberries, strawberries, tangerines. 7/ raisins, prunes, dates, figs, apples. 8/ asparagus, beans, carrots, corn, peas, tomatoes, tomato paste. 9/ asparagus, beans, broccoli, carrots, cauliflower, celery, corn, garlic, lettuce, onions, peppers, potatoes, and tomatoes. 10/Angola, Botswana, Burundi, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Sudan, Seychelles, South Africa, Swaziland, Tanzania, Zambia, and Zimbabwe. 11/ Kenya and Uganda. 12/ All commodities, including those not listed.

FY 1997
SUPPLIER CREDIT COVERAGE 1/

Country/Commodity	Announced Allocation 9/ (In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance (In Millions of Dollars)
GUATEMALA	**10.0**	**0.0**	**10.0**
Fresh fruit 3/		0.0	
MEXICO	**30.0**	**0.0**	**30.0**
Dried fruit 5/		0.0	
Canned fruit 4/		0.0	
Canned vegetables 6/		0.0	
Fresh fruit 3/		0.0	
Fresh vegetables 7/		0.0	
Frozen vegetables 8/		0.0	
Potatoes		0.0	
Tree nuts 2/		0.0	
Wine; Brandy		0.0	

1/ Coverage announced for FY 1997 as of January 10, 1997 as detailed in FAS Program Announcements (tel: 202-690-1621 for information. 2/ almonds, pecans, pistachios, walnuts, hazelnuts. 3/ Apples, apricots, avocadoes, blueberries, cherries, grapes, grapefruit, kiwifruit, lemons, melons, nectarines, oranges, pears, plums, peaches, raspberries, strawberries, tangerines. 4/ peaches, pears, cocktail, tart cherries. 5/ raisins, prunes, dates, figs. 6/ asparagus, beans, carrots, corn, peas, tomatoes, tomato paste. 7/ asparagus, beans, broccoli, carrots, cauliflower, celery, corn, garlic, lettuce, onions, peppers, potatoes, tomatoes. 8/ beans, broccoli, carrots, corn, spinach. 9/ All commodities, including those not listed.

New Zealand approves access for Florida grapefruit; U.S. asparagus also now cleared for entry

New Zealand's Ministry of Agriculture issued a new Import Health Standard on January 16 that clears the way for the entry of Florida grapefruit, effective immediately. This action successfully concludes a market access initiative that had involved the collective input and support of USDA's Animal and Plant Health Inspection Service (APHIS), the Florida industry, and FAS. While welcoming the development, Florida industry contacts point out that current, high shipping costs could constrain the development of the market in the near term. However, one industry source estimated that New Zealand could develop into a 300,000-400,000 carton market over time for Florida grapefruit (approximately 5,700 tons - 7,700 tons). U.S. exports of grapefruit to New Zealand in the first 11 months of 1996, presumably sourced from California and Arizona, totaled 1,741 metric tons, with an associated value of $2.8 million.

U.S. and New Zealand quarantine officials have finalized the terms of a technical agreement which will permit U.S. fresh asparagus to enter New Zealand, beginning with the coming season. The country represents a promising new market for an industry that has seen its exports expand significantly in recent years. For the first 11 months of 1996, U.S. asparagus exports to all destinations totaled 14,161 tons, valued at $51 million.

EU rescinds higher duty assessment on canned corn

The European Union (EU) has reverted to its pre-Uruguay Round policy of assessing import duties on drained weight for canned sweet corn according to the Agriculture Counselor's office in Brussels (USEU) office. The EU had effectively increased its duty on canned corn in July 1995 with the publication of its Uruguay Round tariff schedule showing canned corn duties assessed on net weight, which includes water. In response to repeated approaches to the Commission by USEU, this issue was placed on the agenda for the December EU Agriculture Council meeting and passed by the ministers. The change in policy became effective on January 1, 1997. U.S. exports of canned corn to the EU stood at $34 million in fiscal year 1996, versus $33 million in fiscal year 1995.

U.S./EU Wine Derogations Extended

The European Union (EU) Agricultural Council met in Brussels on January 20, 1997. The EU Agricultural Ministers extended the U.S./EU Wine Accord through, derogations of regulations 1873/84 and 2390/90 until the end of 1997. The terms of U.S.-EU wine trade are governed by the 1983 Wine Accord, which expired in 1993. Under the 1983 Accord, the United States obtained temporary derogations from EU restrictions on certain enological (wine-making) practices and from certain cumbersome certification procedures. Since the Accord expired, the EU has extended these derogations several times; however, the Commission noted that this would be the last extension of the Wine Accord. Representatives from the EU and the United States are tentatively scheduled to meet in Washington, D.C. on February 4 and 5 for further discussion on U.S.-EU wine trade issues.

WORLD TRADE SITUATION AND POLICY UPDATES

Israel increases import fees on U.S. almonds

Israel began in early December 1996 to assess increased fees on imported U.S. in-shell and shelled almonds of approximately $4,000 and $6,000 per metric ton, respectively. Previously, fees assessed were approximately $750/MT for in-shell almonds and $1,000/MT for shelled product. In a December 31 letter to Israel's Ministry of Agriculture, the U.S. Economic Counselor in Tel Aviv cited the quadrupling of the duties and noted that it had been the USG's understanding that, under the November 1996 bilateral trade agreement, "U.S. product would enjoy a status at least as equal to that existing in 1995." The letter requested that "Israel reinstate the conditions of entry existing prior to the recent change in levies." In a response dated January 13, the GOI's Ministry of Agriculture stated that Israel is "currently applying the Agreement exactly as written." FAS is continuing to review U.S. options under the agreement. U.S. almond exports to Israel for the 12-month period ending October 1996 were valued at over $11 million.

California Governor raises fruit pesticide issue while in Indonesia, USG to submit formal comments on proposed system

California Governor Pete Wilson, visiting Indonesia as part of an Asia trade mission, raised the issue of Indonesia's proposed pesticide certification scheme for imported fruit during a January 15 meeting with the GOI's Minister of Industry and Trade, according to the U.S. Agricultural Counselor in Jakarta. The Governor expressed concern over a possible pre-shipment certification requirement noting that the certificates would result in additional costs to exporters, and likely Indonesia's consumers as well. In response to the GOI's earlier WTO notification, the USG intends to submit formal comments by the January 20 deadline. U.S. fresh fruit exports to Indonesia for the 12-month period ending October 1996 were valued at nearly $45 million, up 22 percent from a year earlier.

U.S. International Trade Commission launches study of competition in the U.S. and Canadian potato industries

The U.S. potato industry believes that unfair competition with Canada exists in the North American market for fresh potatoes and processed potato products. Total U.S. exports of fresh potatoes and potato products in fiscal year (FY) 1996 reached $1.2 billion, down from $1.3 billion a year earlier. In FY 1996, the value of U.S. potato exports to Canada was $114 million, a gain of 2 percent from the previous year. In FY 1994, total exports of fresh potatoes and products hit $1 billion, while exports to Canada peaked at $119 million. Specifically, Canadian government policies and industry pricing practices concern the U.S. industry. Therefore, at the request of the U.S. Trade Representative, the International Trade Commission (ITC) has begun an investigation of competition in the structure and performance of the U.S. and Canadian potato industries.

The ITC will examine the domestic and international trade characteristics of the potato sectors in both the United States and Canada. Known legally as a Section 332 investigation, this inquiry will involve extensive research, including interviews of industry and government officials. The Trade Act of 1930 authorizes the ITC to conduct investigations, at the request of the Executive or Legislative branches of the U.S. Government, to analyze factors affecting international trade in particular products.

Production of this potato study has two principal benchmarks. First, the ITC will hold public hearings starting on April 30, 1997 to gather data and information from interested parties. Then, the ITC anticipates completing its work by the end of July 1997.

U.S. Brandy Exports Should Rebound with the Phasing Out of the European Union's Distillation Program and Trade Barriers

During 1982-1992, the European Union (EU) produced an average of 24 million proof hectoliters of excess wine. In order to help support EU wine producers in the face of high carryover stocks, the EU implemented a distillation program to convert the excess EU wine into brandy and alcohol. Some of the excess wine was converted to brandy. The result of the distillation program was the production of inexpensive brandy flowing into the world market. During the distillation program, it was difficult for U.S. brandy to compete on a price basis; U.S. brandy exports flattened. In addition, countries like Japan implemented trade barriers that further limited U.S. brandy exports. U.S. exports are forecast at 2.4 million proof liters in 1996, down 14 percent from the 1995 volume. High tariffs and excise taxes, coupled with a recession in Japan, decreased U.S. exports to this market. As progress is made under the Uruguay Round to reduce trade barriers in countries like Japan and the EU phases out its distillation program, the U.S. brandy industry should be in a strategic position to capitalize on a $6.6 billion world brandy market.

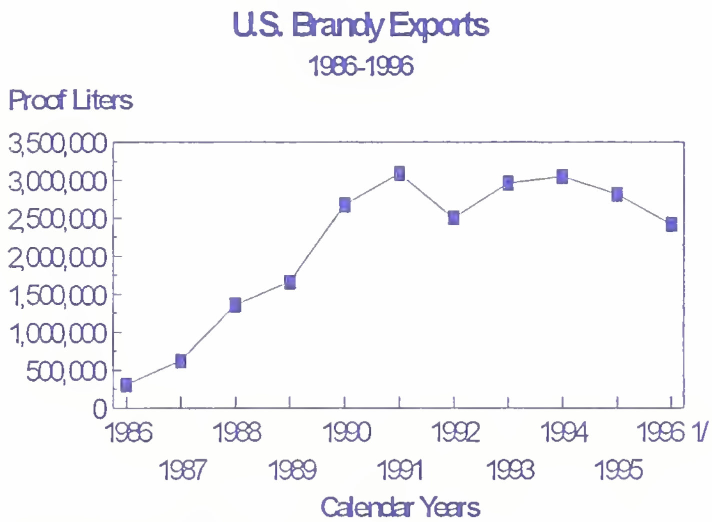
Brandy is defined as alcohol distilled from grapes and aged in oak barrels. Distillation takes place in all of the major grape producing regions. France, Spain, Italy, Eastern Europe, the Commonwealth of Independent States (successor states to the Former Soviet Union), Latin America, and the United States produce a substantial amount of brandy. Statistical data on annual worldwide brandy production are not available.

There is a direct relationship between wine production and brandy production. The European Union (EU) produces approximately 65 percent of the world's wine. During the period 1982-1992, the EU produced an average of 24 million proof hectoliters[1] of wine in excess of demand. This excess production created what was know as the EU "winelake." To help support EU wine producers in the face of high carryover stocks, the EU implemented a distillation program in the form of subsidies to convert the "winelake" into brandy and industrial alcohol. The result of the distillation program was the production of inexpensive EU brandy flowing into the world market. By 1994, EU wine production had declined by 20 million proof hectoliters. In 1995, wine production in the EU stabilized at the 1994 level. During the distillation program, EU brandy was selling at a very low price, which made it difficult for U.S. brandy to compete on a price basis. As the wine surplus was reduced, the EU scaled back its distillation program. In 1996, the EU did not implement a distillation program to eliminate surplus wine.

As a result of the improved wine supply/demand balance in the EU, the production of inexpensive surplus brandy products should be reduced or possibly eliminated. This should put the U.S. brandy industry in a strategic position to capitalize on a $6.6 billion world brandy market. U.S. brandy exports could climb back up to the 1991 level of 3.09 million proof liters. From 1986 to 1991, U.S. brandy exports increased 90 percent, from .31 million proof liters in 1986.

[1] A proof liter equals 1 liter at 100 proof (50 percent alcohol). Hecto means a hundred.

However, as more inexpensive EU brandy (produced in earlier years) saturated the market, U.S. brandy exports started to flatten.



1/ Forecast based on exports through November 1996.
Source: U.S. Census data

Brandy consumption outside of the United States is estimated at approximately $6.6 billion. In 1995, U.S. brandy consumption represented a $634 million business, approximately 7 percent of world consumption. The United States remains a net importer of brandy. On a volume basis, U.S. imports were eight times as much as exports in 1995. However, calculated on a value basis, the United States imported approximately 26 times as much brandy as it exported. U.S. brandy imports for the period January through November 1996 were up 4 percent from 1995. France supplies 72 percent of U.S. brandy imports, approximately $250 million.

The Market Access Program helps the U.S. brandy industry to capitalize on a worldwide market

Worldwide brandy sales have remained constant in the last several years. There are a number of large brandy markets outside the United States which provide an opportunity to increase U.S. brandy exports. As the presence of inexpensive surplus brandy products and trade barriers are reduced, U.S. brandy industry should be in a position to expand exports. In addition to standard brandies, U.S. producers have begun to develop "boutique brandy" products which compete with cognac, the "gold standard" for grape spirits on the world market. U.S. producers are now offering VSOP, XO[2] and varietal brandies to the world market.

While U.S. brandy exports for 1996 are estimated to have decreased 14 percent to 2.42 million proof liters, the U.S. brandy industry is positioning itself to capitalize on an $6.6 billion worldwide brandy market. The U.S. brandy industry is using funds made available through the Market Access Program (formerly the Market Promotion Program) to help fuel international demand of U.S. brandy and boost sales to a number of markets. In 1996, the industry used MAP funds to finance generic and branded activities, such as consumer promotions, advertising, and other trade-related activities in Canada, Germany, Japan, Taiwan, and the United Kingdom.

The largest markets for U.S. brandy are Japan, United Kingdom, Mexico, and Canada. These four markets account for approximately 83 percent of total value and 78 percent of total volume of U.S. brandy exports for the period January to November 1996. The chart on page 16 highlights the major destinations for U.S. brandy exports.

U.S. brandy exports to Japan have slowed

Japan is the largest market for U.S. brandy exports. Almost all of Japan's brandy is imported. In 1995, Japanese brandy sales were 30.12 million proof liters. Bulk imports accounted for approximately 77 percent, 23.2 million proof liters. The balance of the imports was bottled, approximately 6.9 million proof liters. The United States supplied 5.64 million proof liters of brandy to Japan in 1995.

The Japanese brandy market for U.S. brandy posted robust gains in the late 1980s and early 1990s, peaking in 1993 at 1.95 million proof liters. U.S. brandy exports to Japan declined 17

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[2] With the exception of cognac, Very Special Old Pale (VSOP) and Extra Old (XO) are not regulated.

percent between 1993 and 1995 due to the prolonged Japanese recession. U.S. brandy exports to Japan slowed even more in January through November 1996, down 46 percent from the same period in 1995.

Another constraint which limits U.S. brandy exports to Japan is the favorable excise tax provided to domestically produced spirits (primarily "shochu"). Based on alcohol strength, the tax on brandy is ten times the tax rate for shochu. In 1987, a GATT panel determined this excise tax structure is illegal. Japan refused to comply with the GATT ruling for 9 years. A second GATT panel ruling in 1996 again determined that the Japanese excise tax regime is illegal. There are indications that Japan will implement changes in its tax structure in early April 1997.

Japan has also participated in the GATT Uruguay Round agreement to eliminate tariffs on brandy. Tariffs will gradually be eliminated over 10 years commencing in 1995. The tariff and excise reductions provide an excellent opportunity for U.S. brandy to penetrate the 30 million proof liter Japanese brandy market.

U.S. brandy gaining ground in the United Kingdom

In 1989, the United States began exporting brandy to the United Kingdom. In 1994, the United Kingdom emerged as the second largest market for U.S. brandy. Exports for 1995, totaled 500,628 proof liters. U.S. brandy exports to the United Kingdom for the period January through November 1996 are up 17 percent from 1995. U.S. brandy exports to the United Kingdom are forecast at 600,000 proof liters in 1996. The United States has an approximately 1 percent share of the brandy market in the United Kingdom.

The United Kingdom imports 100 percent of its domestic brandy needs. Brandy consumption in the United Kingdom is around 21.6 million proof liters (3.0 million 9-liter cases). Direct imports of brandy are expected to remain sizeable. Brandy holds a 7.9 percent share of the U.K.'s total spirits market. Of this, cognac accounts for 3.5 percent, Armagnac 0.2 percent and brandy/marc 4.2 percent. It is estimated that 56 percent of brandy consumers are male and 44 percent female. Approximately 52 percent are age 50 and over, 26 percent age 35-49, 14 percent age 25-34 and 7 percent 18-24.

Despite the inroads the U.S. brandy industry has made in the U.K. market, there are a number of obstacles that limit U.S. brandy exports, most notably competition from the heavily subsidized EU suppliers. France dominates the U.K. market, supplying 92 percent of the U.K.'s brandy. France has an advantage in the U.K. market because both countries are EU members. French product enters the United Kingdom without a customs tariff. Products from outside the EU face a high tariff which was $8.00 per case prior to January 1995; the tariff is scheduled to transition to zero in 2004. Although U.S. brandy faces stiff competition from EU suppliers, the reduction of trade barriers coupled with the industry's dedication to a long term marketing strategy should allow the U.S. to move into a more competitive position in the U.K. brandy market and increase its market share.

U.S. brandy exports to Mexico limited by economic recession and broom retaliation

Mexico's recent economic recession caused brandy consumption to fall 9 percent in 1995. U.S. exports fell 63 percent from 117,864 proof liters in 1994 to 43,248 proof liters in 1995. Imports, high-priced in U.S. dollar terms, fell 45 percent in terms of volume to only 24,472 proof hectoliters in 1995. The fall in consumer purchasing power also affected domestic production, which fell 7 percent in 1995.

Mexico has traditionally imported brandy from Spain and cognac from France. Brandy imports are dominated by Spain. Spain has increased its share of imports from 67 percent in 1993 to 98 percent in 1995. Mexico imported a total of 24,472 proof hectoliters in 1995 valued at $12 million as compared to 44,633 proof hectoliters in 1994, valued at $21.4 million. Imports have been steadily diminishing as a share of brandy consumption because of the high cost of imports as a result of the peso devaluation in December

1994. In 1993, imports represented 10 percent of consumption but by 1995 imports represented only 3.8 percent of consumption. A modest recovery is expected in 1996. Imports are not expected to recover completely until the year 2000. Imports from Spain will most likely remain steady since Mexicans hold Spanish brandy in high esteem.

U.S. brandy exports for the period January through November 1996 are up 130 percent from the same period in 1995, to 89,394 proof liters; however, U.S. brandies account for less than 2 percent of the import market. The fall in purchasing power has caused Mexicans to shift to low-quality brandies and low priced products, such as beverages made from a mixture of cola and brandy which will continue to limit U.S. brandy export opportunities. Likewise, the fall in consumer purchasing power has made consumption of tequila and rum more popular at the expense of brandy. Brandy faces growing competition from softer drinks, such as beer and wine. The fall in purchasing power, competition from softer drinks coupled with Mexico's decision to increase its tariff on brandy from 0 to 20 percent in retaliation against U.S. actions to assist the broomcorn broom industry against Mexican import competition will further limit U.S. brandy exports.

Canada remains a key market opportunity for U.S. brandy despite sales and marketing constraints

Canada is the fourth largest market for U.S. brandy exports. The United States exported 105,200 proof liters of brandy to Canada in 1995. U.S. brandy exports for the period January through November 1996 are down 5 percent from the same period in 1995. In spite of U.S.-Canada Free Trade Agreement (FTA), the U.S. brandy industry continues to face formidable barriers such as discriminatory cost-of-service fees and other non-tariff barriers. Quebec, Ontario, and British Columbia represent the three largest markets for U.S. brandy; however, provincial monopolies seriously restrict U.S. access to the Canadian brandy market. For example, provincial monopolies established arbitrary charges to reflect higher costs of handling imported spirits vs. domestic spirits; this translates into a 15 percent higher charge on U.S. brandy. Through powers vested by liquor control and/or licensing legislation, provincial government authorities regulate all aspects of brandy imports, such as prices, distribution systems, and types and number of outlets which sell brandy. There have been two GATT panel rulings indicating that Canada's practices are not legal. Since imported and domestic pricing structures are different due to the cost-of-service charge, domestic products can always undersell imported brandy at the retail level.

Canadian brandy consumption has been declining at a rate of 5 percent per year for the past several years. On a per capita basis, annual spirits sales dropped steadily between fiscal year 1990/91 and 1994/95 from 5.28 proof liters to 4.32 proof liters. Brandy has been declining at approximately the same rate as other spirits. However, the value of brandy sales has remained constant due to a shift in a consumer preference for higher valued products. Volume of U.S. exports to Canada is down by 6 percent for the period January through November 1996 from 97,754 proof liters in 1995; however, value of U.S. brandy exports to Canada are up by 20 percent from 1995.

Despite the decrease in the volume of U.S. exports and marketing constraints in Canada, the U.S. brandy industry hopes to capitalize on the Canadian consumer demand for "new" and "different" products in the brandy and grappa brandy categories. U.S. brandy is beginning to make headway in the larger provincial brandy markets of Ontario, Quebec, Alberta and British Columbia. As the EU subsidy program for brandy is considerably reduced because of major reduction in wine production, EU prices will rise and thereby open the door for increased exports from other countries, especially the United States. The EU remains the largest supplier of brandy to Canada. Canada imported 80 percent of its brandy from the EU for the period January through October 1996. France is by far the dominant force in the Canadian brandy market. U.S. brandy represents only 5 percent of Canada's brandy imports; however, as the worldwide demand-supply situation reaches a

point of equilibrium, the U.S. brandy industry should be in a strategic position to capitalize on the Canadian brandy market.

The Future of U.S. Brandy

New products, foreign demand, and market promotion combined with inroads made under the Uruguay Round should improve export opportunities for U.S. brandy. The Uruguay Round "Zero for Zero" Agreement by the Quad Four (United States, EU, Canada, and Japan) will reduce and eventually phase out high tariffs on brandy. Currently, U.S. brandy faces tariffs of 50 percent to 150 percent around the world. However, the U.S. tariff on brandy is less than 1 percent. For example, the United States has a tariff of 95 cents per case; however, the EU tariff is ten times higher, $9 per case.

Under the "Zero for Zero" agreement and subsequent agreements at the Singapore Ministerials , brandy tariffs will be reduced to zero by 2000 and 2004. Also the 45 member International Office of Vine and Wine (OIV) has adopted a resolution to extend the agreement to all countries. The EU and the United States are requiring more countries to comply with the "Zero for Zero" agreement as a pre-condition for accession to the World Trade Organization. As excessive tariff rates are lowered to the U.S. level and the worldwide demand-supply situation reaches a point of equilibrium, the U.S. brandy industry should be in a strategic position to penetrate the $6.6 billion world brandy market.

For further information on supply, distribution and trade, contact Yvette Wedderburn Bomersheim at 202-720-9903. For information on marketing opportunities contact Ted Goldammer on 202-720-8498.

U.S. BRANDY EXPORTS
1991-1996 1/
(PROOF LITERS)

DESTINATION	1991	1992	1993	1994	1995	1996 2/
SELECTED COUNTRIES						
Japan	1,692,218	946,444	1,949,910	1,946,381	1,619,392	856,172
United Kingdom	212,494	188,078	68,829	300,023	500,628	548,456
Mexico	185,867	312,101	172,547	117,864	43,249	102,495
Canada	212,326	346,170	183,782	88,847	105,200	89,394
Thailand	212,572	28,069	99,622	62,012	90,377	75,011
Korea	0	0	0	6,461	71,387	54,910
Bahamas	15,350	68,397	60,745	58,607	65,942	52,863
Hong Kong	52,619	0	1,192	43,795	14,372	33,117
ALL OTHERS	503,084	614,753	422,781	427,193	303,725	241,233
Total Volume	3,086,530	2,504,012	2,959,408	3,051,183	2,814,272	2,053,651

1/ Calendar year data.
2/January through November 1996 data.
Source: U.S. Census data.

AVOCADO SITUATION IN SELECTED COUNTRIES

Avocado exports by selected foreign countries are forecast to increase by 2 percent in 1996/97. Export increases by Chile, Israel, South Africa, and the United States will likely more than offset reduced shipments from Mexico and Spain. Israel, the world's largest avocado exporter, is forecast to increase exports by 12 percent. Chile's exports are forecast to increase by 24 percent as that country is trying to diversify its markets in Argentina and Europe. Depending on the size of the domestic crop, opportunities for U.S. avocado exporters in 1996/97 to Europe, Canada, and Asia could also improve because of lower exports from Mexico.

Selected Country Avocado Outlook

Avocado production in six major producing countries in 1996/97 is estimated at 1.0 million tons, down 12 percent from 1995/96. A 20-percent decline in Mexico's production is expected to be partially offset by increases in Chile, Israel, the United States, and South Africa.

Selected country exports are forecast to rise 2 percent in 1996/97 above the previous year. Despite the 20 percent decrease in production in Mexico, Mexican exports are only forecast to decline by 9 percent, thus keeping world exports near their record level in 1995/96. All other producing countries, except Spain, are forecast to increase exports in 1996/97.

Chile

Avocado production for the 1996/97 season (January-December 1997) is forecast at a record 59,400 tons, up 6 percent from the 1995/96 output. Production is forecast up in 1996/97 as a large number of orchards are reaching bearing age and area is expanding. Production is projected to surpass 90,000 tons by the year 2000, with the Hass variety comprising approximately 70,000 tons of the total. The increase in plantings reflects the stimulus provided by high producer prices during the past few years and a favorable export climate.

Harvested area should continue to expand over the next 5 years as previously planted trees mature.

Chilean avocado exports in 1996/97 are forecast to increase by 24 percent to 21,600 tons. The United States continues to be Chile's largest export market. However, the avocado producers association has been advising its members to diversify markets. Many producers in Chile expect exports to the United States to decline somewhat given the possibility that Mexico will gain access to the U.S. market. Promotional campaigns aimed at the domestic market and Argentina have been successful this past year. Producers and exporters contribute U.S. $.01 per kilogram exported towards foreign market promotional campaigns. The Chileans also expect to export more avocados to Europe. Good international prices have helped improve export opportunities.

Consumption in 1996/97 is forecast at 37,800 tons, 12 percent above the previous year's revised estimate. Larger supplies and promotional campaigns contributed to the increase.

The Chilean Government does not provide direct subsidies or special tax incentives for avocado production. Avocados and other fruits and vegetables do benefit from the recently created

$10 million Export Promotion Fund for agricultural products.

Israel

Avocado production in 1996/97 (October/September) is forecast at 85,000 tons, up 9 percent from the revised 1995/96 estimate because of favorable weather. However, declining profitability and water scarcity are likely to keep output below the 100,000-ton mark for the foreseeable future.

The area planted to avocados is estimated at about 8,000 hectares. Because of high production costs and water shortages, some plantings in marginal areas have been uprooted over the past several years. Despite these difficulties, production by the year 2000 is projected to stabilize at approximately 90,000 tons, of which approximately 70 percent will be exported. The Ettinger, Fuerte, Hass, Nabal and Reid varieties are the significant varieties grown in Israel. Prices to growers are reported to have fallen by almost 20 percent due to low currency exchange rates.

Israel is expected to continue to be the world's largest avocado exporter in 1996/97

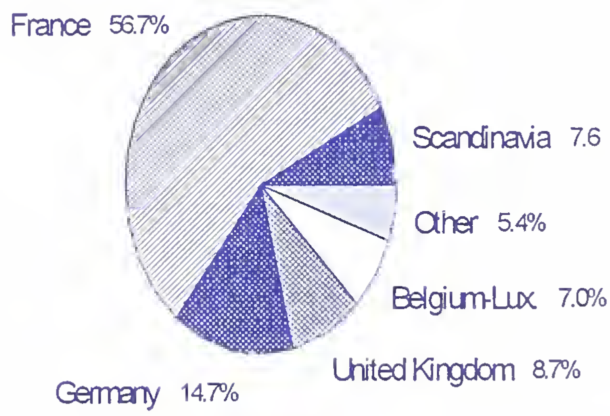
Exports from Israel are forecast to reach a record 55,000 tons in 1996/97, an increase of 12 percent over the 1995/96 volume. Higher domestic production, combined with reduced Spanish and Mexican supplies are likely to boost Israeli exports. France continues to be Israel's largest market, accounting for over 50 percent of total exports. Israel has tried to diversify its markets. In 1996/97 Israel is expected to invest in sales promotion efforts in its European markets. Germany, the second largest export market, has been increasing its imports from Israel in recent years and now purchases about 15 percent of Israel's avocado exports. Other European customers include the United Kingdom, Scandinavia, Belgium-Luxembourg, and Switzerland. Spain and Mexico have been Israel's primary competition in the European markets. South African avocados also compete in Europe beginning around April. If Mexico gains approval to export avocados to the United States, Israel would face less competition with Mexico in Europe. As the Mid-East peace process progresses, it is hoped that ties with neighboring countries of the Middle East (especially the oil-rich Persian Gulf states) may lead to increased exports of Israeli avocados and other fruits and vegetables to the region. Israel is also planning to develop avocado markets in the Pacific Rim countries.

Consumption of avocados in Israel rose by 33 percent in 1995/96, and is expected to increase further in 1996/97 because of increased supply and subsequently lower prices. The local marketing board, FPMBI, continues to conduct advertising campaigns to increase domestic consumption. As a result, the domestic market, which previously served as a dumping ground for export rejects, currently demands higher quality fruit.

Government policy on avocado exports has remained unchanged in spite of continued efforts by the Fruit Production and Marketing Board to include this crop in the Israeli government system of price "safety nets" for key crops. The Ministry of Agriculture continues to provide grants of 40 percent or less for new plantings in preferred regions of the country.

Israeli Avocado Exports by Destination

Marketing Year 1995



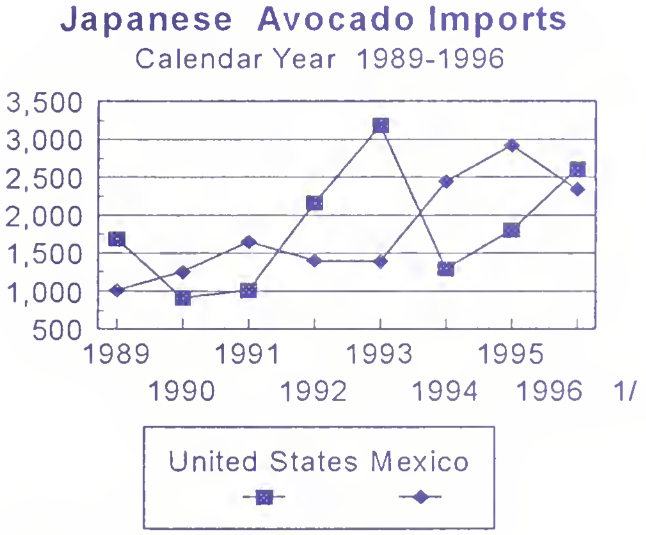
Percent by Volume

Source: U.S. Agricultural Attache

Japan

Avocados were introduced to Japan in the early 1970's . There is no domestic production. Because Japan's strong domestic demand and favorable exchange of the dollar against the yen, Japan continues to be a desirable market for the sale of quality fruit.

Japanese imports of avocados are forecast to increase about 20 percent to 5,700 tons in 1996/97. Currently, only the Hass variety is marketed to Japan. The United States and Mexico are currently the only suppliers of avocados to Japan. U.S. avocados usually face stiff price competition from Mexico. While the favorable exchange of the dollar against the yen has helped U.S. export prospects to Japan, Mexico's much lower valued peso has helped increase Mexican market share. Though of lower quality, Mexican avocados are also usually lower priced than those from the United States and are favored by a lower rate of import duty (5 percent for the United States compared to 3 percent for Mexico) on a CIF basis due to Mexico's status under the Generalized System of Preferences. Recent market prices of U.S. avocados in Japan have reached 313 yen per kilogram compared to last year's price of 254 yen (CIF). Mexican prices were about 193 yen compared to last year's price of 180 yen per kilogram.



Source: U.S. Agricultural Attache
1/ January to September 1996

Although U.S. and Mexican avocados do not compete in the same season, the Mexican season is increasingly encroaching on the U.S. season especially from January to March and in August. This year, however, with reduced supplies forecast for Mexico, U.S. avocados may have an opportunity to expand exports to Japan.

Challenges for expanding consumption in the future in Japan will be to further educate the Japanese consumer and local handlers (especially regional distributors outside the big cities) on the health benefits of avocados, and when to deliver, eat, and how to use them. In-store promotions and menu presentations at the beginning of the U.S. avocado season are highly recommended. At present, most avocados in Japan are sold at the retail level and are prepared either plain or in salad plates with vegetables. In addition, the Japanese have begun to use in avocados in new ways (ie. milk shakes, spring rolls, soups).

Avocado use in the food service industry including restaurants and hotels, is still small (about 20 percent) but has very good potential for the future. Promotional efforts should aim at this area of the food marketing system and should increase consumer awareness and knowledge of avocados. Currently 80 percent of avocados in Japan are consumed in the Tokyo and Osaka areas.

The Japanese prefer the larger size 24 avocados which constitute 70 percent of avocados on the market. This year's prices of California 24's were approximately 2,000-2,500 yen per tray, wholesale, and 150 to 250 yen per fruit, retail. Mexican avocados ranged from 1,400 to 1,600 yen per tray and 100 to 150 yen per fruit.

Mexico

Production to fall sharply in 1996/97

Mexico is the world's largest producer of avocados. The 1996/97 crop (harvested August 1996 through July 1997) is forecast at 635,000 tons, down 20 percent from the revised 1995/96 estimate because of excessive rainfall, hail, and low temperatures during the flowering season of the Michoacan crop. The inclement weather

caused early fruit drop, lower yields, and smaller-sized fruit.

The area planted to avocados in 1996/97 is forecast at 93,000 hectares, virtually unchanged from last season; harvested area is forecast up slightly, to 90,100 hectares. Harvested area is likely to remain stable over the next few years because the state of Michoacan, which accounts for approximately 85 percent of Mexico's annual avocado output, has run out of land suitable for avocado cultivation. However, given the significant number of new trees planted in the late-1980's and early-1990's, total production is expected to expand approximately 30 percent between 1998 and the year 2000 as trees reach full maturity. Avocados are also grown in the states of Nayarit, Puebla, Morelos and Mexico.

Farmgate prices for export-quality fruit are averaging 60 to 70 percent above last season, well above the 26 percent rate of inflation. The average farmgate price for 1996/97 is estimated at about 1,200 pesos per ton (US$156 per ton) for the peak season (November through April). During the off season (May through September), growers may receive over 2,500 pesos per ton (US$325 per ton). Growers have succeeded in commanding superior prices this season because of the short crop and price negotiations. In addition, total production costs have remained fairly stable this year. Usually the most expensive inputs include agro-chemicals, fertilizer, electricity for irrigation, and finance costs for production loans. Labor costs are growing more slowly.

Decreased Mexican exports may signal additional U.S. export opportunities

Avocado exports in 1996/97 are forecast to decrease by 9 percent to 40,000 tons due to the expected smaller harvest. This sharp decline comes after Mexican exports of avocados rose dramatically, 69 percent, from the 1994/95 to the 1995/96 season. This was mostly due to a large supply of avocados.

Mexico also continues to export processed avocados to the U.S. market. Processed products include guacamole, paste and avocado oil. In 1995/96, exports of processed avocados have decreased 1 percent to 14,899 tons. Because of the strong demand for processed avocados in the United States, exports are likely to rise again when more Mexican avocados are available.

The vast majority of avocado production in Mexico is sold to the fresh domestic market. Exports of avocados currently account for only about 6 percent of production. Europe (especially France), Canada, and Japan are Mexico's largest export markets. Mexican export data show shipments to the United States. Currently, only Alaska is permitted to import avocados from Mexico. The remainder are likely transshipments to other countries (ie. Canada). Future growth in the Mexican avocado industry will depend in great part on the growth in exports.

Growth in the Mexican avocado industry partially depends upon future access to the U.S. market. According to sources within the Mexican industry, about 15-20 percent of the fruit now produced is considered to be of export quality. USDA's Animal and Plant Health Inspection Service (APHIS) currently is reviewing public comments on the proposed opening of the U.S. Northeastern market to Mexican avocados during the winter months (November to February). On the Mexican side, SAGAR, the Mexican inspection agency, in September published a new phytosanitary regulation in order to establish phytosanitary requirements and procedures for transporting fresh avocados within Mexico. The goal of this action is to facilitate exports by protecting the major growing regions from pest infestations.

Consumption of avocados in Mexico is expected to decrease 20 percent in 1996/97 to 595,000 tons. Decreased supply and higher retail prices are the primary factors. However in 1995/96, the Michoacan Avocado Commission and SAGAR conducted a 3 month (TV, radio, and press) advertising campaign to increase domestic consumption. Another similar campaign is expected in 1996/97. Avocados for the domestic sector pass through wholesale distributors which sell to local supermarkets, hotels and restaurants. Handling and spoilage problems are reportedly steadily decreasing.

The government does not have support policies for avocados. However, avocados, along with

other fruits and vegetables, benefit from the government's Agricultural Debt-Relief Program (FINAPE). FINAPE is a program for restructuring overdue and non-performing loans in order to reduce the size of monthly payments on the existing debts of agricultural and aquaculture producers. This program has helped particularly those who were hurt by the inflation rate in 1995 after the peso devaluation.

Although Mexico permits the import of avocados, because of current prices and the peso devaluation, avocado imports are not generally competitive in Mexico and only small amounts have been shipped. Mexico maintains its 20 percent tax on imports of avocados with the exception of the United States, where under NAFTA regulations there is a mutual tariff of approximately 9.24 cents/Kg in 1995. This tariff (08.04.40.01) will be phased out in 10 years.

South Africa

The 1996/97 (November/October) avocado crop is estimated at a record 57,000 tons, up 8 percent from 1995/96. Rains during the later part of 1995 significantly improved production in 1995/96 and alleviated irrigation water shortages experienced prior to the 1995/96 season. Dams are currently full, which means that water supplies should be available for the next few years.

The South African avocado industry is in an active growth mode. As of the 1995/96 season, 30 percent of the area planted to avocados had not yet come into production and 48 percent had not yet reached full production. Consequently, output is projected to increase over the next few years, even if the rate of new plantings slows.

Avocados are harvested year-round in South Africa, depending upon the variety, with most of the crop harvested from July through October. The Fuerte and Hass varieties normally account for about 75 percent of the South African crop; the remainder is comprised of the Ryan, Edranol, and Pinkerton varieties. Approximately 11,050 hectares are planted to avocados in South Africa, mainly in the Eastern Transvaal which is 55 percent of the plantings. The second largest production area is the Nelspruit Burgershall area that contains 23 percent of the plantings.

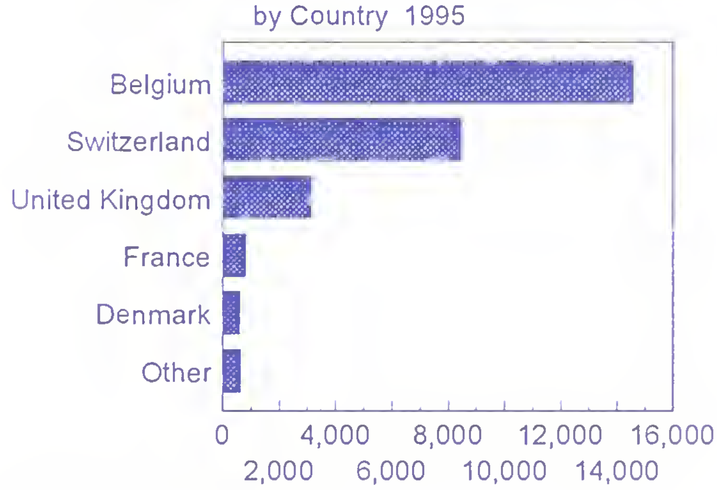
The avocado industry in South Africa is very technically advanced. Production starts in the nursery where cloned Phytophthora (root rot) resistant rootstocks are produced from the Duke variety on which the desired variety is grafted. This nursery procedure is complex and costly. Soil preparation is based on sampling and most avocado production is irrigated.

About 70 percent of South African avocados are exported. All South African export efforts are aimed at meeting the import requirements of the European markets. This includes size, quality, harvesting techniques, transportation, and post harvest handling.

EU tariffs are still troubling to South African exporters

The South Africans are still negotiating with the EU for a zero percent tariff rate. A reduction from 4 to 3.5 percent (December 1 to May 31) and from 8 to 6 percent (June 1 to November 30) was finally granted under the General System of Preferences (GSP). Negotiations are continuing as they attempt to gain the standard benefits granted to all other GSP countries, except South Africa.

South African Avocado Exports
by Country 1995



Source: U.S. Agricultural Attache

South African exports in 1996/97 are expected

to rise 9 percent above the previous level due to the higher production forecast. Exports are usually contracted with private traders with the subtropical arm of UNIFRUCO, the big deciduous fruit exporter, as a major player. Practically all of South Africa's avocado exports go to the EU. In 1995/96, South Africa's primary markets were Belgium (14,619 tons), Switzerland (8,495 tons) the United Kingdom (3,167 tons), and France (836 tons).

Domestic consumption of avocados in 1996/97 is forecast to rise modestly by 5 percent to 22,000 tons. Approximately 30 percent of the crop is consumed domestically. Fresh avocados are usually marketed through municipal markets but direct contracts are becoming more popular. South Africa does not generally import avocados. The low internal prices combined with a 5 percent duty on imports, effectively limits shipments from overseas. Only small quantities from nearby countries are able to cross the border.

The South African Grower's Association (SAGA) looks out for the interests of the industry and is financed by a voluntary duty on exports. SAGA also finances research and negotiates with government officials. Export volumes are coordinated with fifteen export companies; five companies handle about 90 percent of the trade. The industry does not receive any government assistance since losing the 6 percent GEIS export incentive that was available before the Uruguay Round.

Spain

Avocado production in 1996/97 (July/June) is forecast at 34,000 tons, 15 percent below last year's output of 40,000 tons because of an off-year in the bearing cycle and lingering drought damage sustained by orchards during the past few years. The area planted to avocados is forecast at 8,500 hectares, down slightly from 1995/96; harvested area is forecast up slightly, to 8,000 hectares.

Although avocados are harvested October through June, the bulk of the crop is harvested between November and January. Spain's avocado industry is concentrated in Andalucia (mainly in the provinces of Granada and Malaga), which accounts for about 90 percent of the total area under cultivation. The balance of the crop is produced in the Canary Islands and, to a lesser extent, in the Levant. The total area devoted to avocado production will likely remain stable over the long term, varying with the availability of irrigation water supplies.

The primary avocado varieties grown in Spain are the Hass, Bacon, and Fuerte. Hass accounts for almost 80 percent of the total production and is the most popular. Although, some producers have recently tried growing the Gwen and Fuerte varieties because of their higher yields and earlier ripening qualities. Spanish avocado producers use high quality seed imported mostly from California between December and January. Spanish avocados are marketed from October to June in Peninsular Spain and from September to March in the Canary Islands.

Export prospects declining in 1996/97

Exports in 1996/97 are forecast to fall 20 percent to 25,200 tons due to short supplies. Spain exports primarily to EU countries with France taking about 80 percent of the total. The remainder is exported to Scandinavia and Switzerland. Competition with Israel for sales to the EU are expected to be tight for Spain given Israel's increased export forecast. Spain and Israel ship during the same export season each year.

Thus far in the 1990's, avocado consumption has remained at a fairly low level. However, additional avocados are forecast to be sold in the domestic market as consumption rises by a modest 5 percent in 1996/97.

Consumption could expand with the help of promotional information and educational campaigns. Avocados are still considered relatively unfamiliar to the Spanish. Currently, avocados are eaten in dips, fresh in salads, or with seafood.

Continued openings may exist for U.S. avocado exports

Spanish avocado imports in 1996/97 are forecast to increase 11 percent to 3,000 tons. Most of

the imports are obtained from South Africa and Mexico which do not compete with the Spanish crop. Spain's declining production and exports may offer openings for U.S. exports to Spain and its traditional markets. In 1995/95 the United States exported 67 tons of avocados to Spain. The best opportunities exist in summer between July and September when there are no avocados available from the Spanish crop in the local market.

Imports of U.S. fresh avocados must be accompanied by an APHIS phytosanitary certificate. There are no government subsidies for avocados in Spain. However, the regional autonomous governments in avocado producing areas reportedly have special credit programs available for avocado producers to purchase inputs such as seed and fertilizer.

Dominican Republic

The Dominican Republic is poised to become the world's third largest avocado producer

Avocado production in 1996/97 (June/May) is forecast at 97,940 tons, up 31 percent from 1995/96 because of improved weather and an increase in bearing area. If this forecast proves correct, the Dominican Republic will replace Israel as the world's third largest avocado producer. Exports account for about 15,000 tons. Production for export primarily occurs in the Mao and Bani areas. The Dominican Republic is the second-largest exporter of avocados to the United States, after Chile. Although the cost of some inputs is high, labor is relatively cheap and continued growth in the industry is expected as global awareness and demand for avocados expands.

In 1995/96 Dominican avocado exports to the United States rose 5 percent to a record 6,118 tons. Given the rapidly increasing production of avocados, it is likely that exports to the United States will increase again next season.

Commercial production of avocados began in 1966. Production of avocados occurs nearly year-round (June through April) in the Dominican Republic, but the main harvest period runs from early-November through late-December. Although there are 18 grafted varieties of avocados cultivated in the Dominican Republic, the varieties most popularly grown for export include Simmonds, Popenoe, Semil No. 34 and No.43, Melendez, Hass, Hall, Booth, Lula, and Choquette. Most production for export is irrigated.

Most of the Dominican Republic's exports go to the United States each year. They are marketed mostly in New York, Puerto Rico, and Miami. Dominican avocados enter the United States duty free under the Caribbean Basin Economic Recovery Act. The remainder of exports are largely sent to the European Union including to Belgium-Luxemburg, Germany, the Netherlands, France and Italy. Small amounts are also exported to other Caribbean countries and to Canada. Most producers generally prefer to sell their avocados to an exporter who assumes the risks of exporting.

The Dominican Republic does not import avocados because of abundant local supplies. Although no consumption statistics are available, the local population generally consumes avocados of the Criollo variety which grow wild throughout the country. Occasionally they may consume varieties that are not exported due to oversupply in the United States or quality problems. Any imports would be subject to licensing requirements, a 25 percent CIF duty and a value added tax of 8 percent. At present, the Dominican Republic has no governmental production, marketing or export policy for avocados.

United States

Preliminary assessments for 1996/97 indicate production could approximate 173,000 tons, the same level as 1995/96. However, strong winds in December and the threat of January frosts may temper the initial 1996/97 projection of a 2-percent increase in the California crop.

Avocados are harvested year-round in California, which accounts for approximately 89 percent of total U.S. production. The main harvest in Florida runs from July through February. The official 1996/97 estimate of total U.S. avocado production will be available from USDA's

National Agricultural Statistics Service (NASS) in July 1997.

U.S. exports of avocados totaled 9,444 tons in 1995/96, 29 percent below the previous year's level. Lower prices in foreign markets and increased domestic demand discouraged exports. France, which was the largest market last year, decreased its imports of U.S. avocados by 95 percent, although some U.S. avocados may have arrived via other countries. This year the Netherlands increased imports by 89 percent or 3,875 tons, accounting for 41 percent of total U.S. exports. Some exports to the Netherlands may have been transshipped to other countries as well. Japan and Canada were the next largest markets accounting for 29 and 12, percent of the volume, respectively.

Exports in 1996/97 are forecast to be similar to the previous year's level, about 10,000 tons, but could increase if supplies are available and the industry expands in markets where Mexico's exports may be lower due to decreased production. These possibilities exist in Japan, Canada, and in Europe. If Mexican avocados are permitted in the Northeastern United States, these export opportunities could increase significantly.

U.S. avocado imports decreased slightly in 1995/96 to 21,175 tons, down 5 percent below the previous year. Most of the imports came from Chile, over 12,911 tons or 61 percent, and the Dominican Republic, 6,118 tons or 29 percent of the import total. Total imports in 1996/97 may increase slightly but will depend on the size of the U.S. crop and changes in U.S. import policy.

The United States imports Mexican processed avocados. In 1994/95 over 15,000 tons were imported. In 1995/96 imports decreased slightly by 1 percent to 14,899 tons due to smaller supplies in Mexico. However imports are likely to increase again next season if Mexican production improves. This trend has captured the interest of other avocado producers who are also considering processing avocados for export to the U.S.

U.S. consumption of avocados has kept pace with U.S. production in recent years. Current data suggest that U.S. demand for avocados will continue growing. The Hispanic population's familiarity with avocados and the nation's increasing interest in ethnic, gourmet and healthy foods may signal a promising future for avocados in the United States.

(For further information on avocado supply, distribution, and trade, contact Stephanie Riddick, 202-720-9792. For information on marketing contact Steve Shnitzler, 202-720-8495. For information on production contact Kelly Kirby Strzelecki, 202-720-6791.

AVOCADOS: PRODUCTION, SUPPLY, AND DISTRIBUTION
(Metric Tons)
Marketing Years 1993/94 - 1996/97

Country/ Marketing Year 1/	Production	Imports	Total Supply	Exports	Domestic Consumption	Total Distribution
Chile						
1993/94	50,000	0	50,000	20,100	29,900	50,000
1994/95	48,000	0	48,000	12,000	36,000	48,000
1995/96	51,200	0	51,200	17,400	33,800	51,200
1996/97 F	59,400	0	59,400	21,600	37,800	59,400
Israel						
1993/94	49,000	0	49,000	29,000	20,000	49,000
1994/95	57,800	0	57,800	36,000	22,000	58,000
1995/96	78,100	0	78,100	49,000	29,000	78,000
1996/97 F	85,000	0	85,000	55,000	30,000	85,000
Japan						
1993/94	0	4,573	4,573	0	4,573	4,573
1994/95	0	3,740	3,740	0	3,740	3,740
1995/96	0	4,725	4,725	0	4,725	4,725
1996/97 2/	0	4,950	4,950	0	4,950	4,950
Mexico						
1993/94	709,000	0	709,000	15,000	694,000	709,000
1994/95	799,000	0	799,000	26,000	773,000	799,000
1995/96	790,000	0	790,000	44,000	746,000	790,000
1996/97 F	635,000	0	635,000	40,000	595,000	635,000
South Africa						
1993/94	52,244	4	52,248	37,248	15,000	52,248
1994/95	48,150	5	48,155	28,400	19,750	48,150
1995/96	53,000	5	53,005	32,000	21,005	53,005
1996/97 F	57,000	0	57,000	35,000	22,000	57,000
Spain						
1993/94	51,745	900	52,645	39,100	13,545	52,645
1994/95	35,100	2,150	37,250	26,500	10,750	37,250
1995/96	40,000	2,700	42,700	31,500	11,200	42,700
1996/97 F	34,000	3,000	37,000	25,200	11,800	37,000
TOTAL FOREIGN						
1993/94	911,989	5,477	917,466	140,448	777,018	917,466
1994/95	988,050	5,895	993,945	128,900	865,240	994,140
1995/96	1,012,300	7,430	1,019,730	173,900	845,730	1,019,630
'1996/97 F	870,400	7,950	878,350	176,800	701,550	878,350
United States						
1993/94	130,400	17,874	148,274	9,014	139,260	148,274
1994/95	158,990	22,299	181,289	13,380	167,909	181,289
1995/96	172,590	21,175	193,765	9,444	184,321	193,765
1996/97 F	173,000	23,000	196,000	10,000	186,000	196,000
GRAND TOTAL						
1993/94	1,042,389	23,351	1,065,740	149,462	916,278	1,065,740
1994/95	1,147,040	28,194	1,175,234	142,280	1,033,149	1,175,429
1995/96	1,184,890	28,605	1,213,495	183,344	1,030,051	1,213,395
'1996/97 F	1,043,400	30,950	1,074,350	186,800	887,550	1,074,350

1/ Marketing Years: Israel - October/September; Chile, Japan and South Africa - Calendar Year of the second year shown; Mexico - August/July; Spain - July/June; United States - November/October.
Sources: Reports from U.S. Agricultural Attaches. USDA/NASS estimates. U.S. Department of Commerce.
2/ Japan - Jan. to Sept. F - Forecast

U.S. EXPORTS OF AVOCADOS
MARKETING YEARS (November/October) 1991/92-1995/96
METRIC TONS

Destination	1991/92	1992/93	1993/94	1994/95	1995/96
North America					
Canada	3,426	5,299	1,985	1,941	1,101
Mexico	0	16	0	14	13
Subtotal	3,426	5,315	1,985	1,955	1,114
European Union					
Sweden	13	376	226	507	364
United Kingdom	363	1,897	877	1,360	884
Netherlands	108	482	1,411	2,052	3,875
France	493	2,928	2,195	5,207	233
Germany	0	4	79	6	19
Spain	0	132	20	23	67
Other	16	53	112	19	0
Subtotal	993	5,872	4,920	9,174	5,442
Asia					
Singapore	0	0	28	0	1
Korea, Republic of	8	4	56	26	93
Hong Kong	0	3	71	61	44
Taiwan	0	67	0	0	1
Japan	2,246	3,310	1,940	2,086	2,719
Subtotal	2,254	3,384	2,095	2,173	2,858
Other Countries	24	31	15	78	30
Grand Total	6,697	14,602	9,015	13,380	9,444

Source: U.S. Bureau of the Census

U.S. IMPORTS OF AVOCADOS
MARKETING YEARS (November/October) 1990/91-1995/96
METRIC TONS

Destination	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96
North America						
Mexico	233	807	541	718	484	1,703
European Union						
Italy	0	59	0	0	0	0
Caribbean						
Bahamas, The	98	60	315	468	246	355
Jamaica & Dep.	0	2	15	0	2	0
Haiti	0	0	2	0	0	0
Dominican Republic	1,935	5,783	6,011	4,648	5,808	6,118
Subtotal	2,033	5,845	6,343	5,116	6,056	6,473
South America						
Chile	11,276	16,807	5,570	12,040	15,526	12,911
Other Countries	36	17	2	0	232	88
Grand Total	13,578	23,535	12,456	17,874	22,298	21,175

Source: U.S. Bureau of the Census

U.S. IMPORTS OF PREPARED AVOCADOS
MARKETING YEARS (November/October) 1990/91-1995/96
METRIC TONS

Destination	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96
Mexico	5,048	5,331	5,798	10,031	15,121	14,899
Costa Rica	0	0	0	0	14	0
Honduras	34	0	0	0	0	0
Israel	0	5	0	0	0	0
South Africa, Repub.	0	0	7	0	12	8
Phillipines	1	1	0	0	2	2
France	0	0	0	0	0	18
Grand Total	5,083	5,337	5,805	10,031	15,149	14,927

Source: U.S. Bureau of the Census

Orange Juice Outlook For Selected Countries

Orange juice production in the major Northern Hemisphere producing countries in 1996/97 is forecast at a record 1.16 million metric tons, 5 percent above the previous year's level, based on expected record U.S. production. These large supplies will continue to challenge the marketing ability of exporters. Northern Hemisphere orange juice exports in 1996/97 are forecast at a record based on likely higher U.S. exports. U.S. orange juice exports in 1995/96 reached a record 92,000 tons, 10 percent above the previous year's shipments. The European Union and Japan accounted for most of the expansion in U.S. sales. Promotion efforts under the Market Access Program and awareness of the good quality of U.S. orange juice helped to boost U.S. exports in 1995/96.

Major Producers in the Northern Hemisphere

Orange juice production in 1996/97 in selected producing countries in the Northern Hemisphere is forecast to increase by 5 percent to 1.16 million metric tons (65 degrees brix). Increased orange juice production in the United States will likely more than offset decreases in Spain, Mexico, Italy, Morocco, and Greece. U.S. orange juice production accounts for 85 percent of the total Northern Hemisphere 1996/97 orange juice production forecast.

Total orange juice exports in 1996/97 for selected countries in the Northern Hemisphere are forecast at 261,852 tons, 1 percent above the previous year's shipments. Higher exports are forecast from the United States and Turkey, while orange juice shipments from all other selected countries are expected to decrease in 1996/97. Current lower orange juice prices could boost world demand for orange juice.

United States

U.S. orange juice production in 1996/97 is forecast at a record 980,000 metric tons, 7 percent above last season's output. More oranges will be processed in 1996/97 as a result of an expected record orange harvest in Florida, the main producing state, which will increase overall U.S. orange juice production prospects. The Florida frozen concentrated orange juice (FCOJ) yield is forecast at 1.52 gallons (42 degrees brix) per box, the same as last year's yield. Florida is expected to account for nearly 95 percent of total U.S. orange juice output.

U.S. orange juice exports should continue to expand in 1996/97, with exports forecast at a record 100,000 tons, 9 percent above last season's record shipments. Major U.S. customers are the European Union (EU), Canada, Japan, and Korea. The EU accounted for 43 percent of total U.S. orange juice exports in 1995/96 (December-November). Canada, Japan, and Korea accounted for 27, 12, and 4 percent, respectively. Increased promotion efforts, under the Market Access Program (MAP), and awareness of the good quality of U.S. orange juice have boosted exports in recent years.

U.S. FCOJ imports are likely to decrease in 1996/97 due to the expected larger domestic production. Domestic consumption of orange juice

should increase in 1996/97 if current relatively low prices continue.

Mexico

Mexico's orange juice production in 1996/97 is forecast to dip slightly to 48,000 tons. Less fruit is expected to be processed this season due to a smaller orange harvest. Mexico is heavily dependent on international FCOJ prices as well as domestic prices for fresh oranges. If current relatively low international FCOJ prices continue, it will make it even more difficult for processors to compete with the fresh market for the domestic crop.

Mexico's orange juice exports in 1996/97 are forecast at 46,000 tons, down 4 percent from shipments in 1995/96. Mexico filled about 92 percent of the U.S. orange juice tariff rate quota under NAFTA in 1996 and is expected to fill the 1997 quota. The United States is the main market for Mexican FCOJ, with Japan and European countries also becoming major customers.

Under NAFTA, Mexico has access to the United States market for 40 million gallons of FCOJ, single strength equivalent (or 28,452 tons, 65 degrees brix) at a duty of 4.625 cents per liter. Beyond the 40 million gallon level, and up to 70 million gallons SSE, the full NAFTA rate for 1997 of 8.325 cents is applied. Assuming snapback price conditions are not in effect, the NAFTA rate would continue to be applied beyond the 70 million gallon level. However, in the event the price conditions are in snapback condition, the full MFN rate, currently 8.55 cents per liter for 1997, would be assessed on all imported volumes beyond the 70 million gallon threshold. This basic mechanism will remain in effect during the 15-year phase-in period agreed upon in the NAFTA negotiations, although the quantity trigger level will be increased to 90 million gallons SSE in year 2003.

Spain

Spain's orange juice production in 1996/97 is forecast at 57,000 tons, 3 percent below the revised 1995/96 level. A decline in deliveries of oranges to processors is expected due to a smaller orange harvest. Oranges used in Spain to produce juice are mainly those that cannot be marketed for fresh consumption. Most orange processing plants in Spain are located in the Valencia region.

Spanish orange juice exports in 1996/97 are forecast 3 percent below the 1995/96 level based on the expected smaller production. The bulk of orange juice exports are expected to go to traditional export markets in the EU, such as France, Germany, and the United Kingdom. Orange juice exports are not eligible for EU subsidies. Strong competition from Brazil, Israel, and other key producing Mediterranean countries represent the principal obstacles to the expansion of Spanish citrus juice exports to third countries.

Italy

Orange juice production in Italy in 1996/97 is expected to decrease 11 percent to 30,780 tons, as a significantly smaller orange crop will likely reduce the amount of oranges delivered to processors. Italy's citrus juice industry produces juice mainly in response to EU processing subsidies rather than in response to consumer demand. Exports of orange juice are forecast to decrease only marginally, despite the smaller production, due to the continued devaluation of the Italian lira and the likely drawdown of stocks.

Greece

Greek orange juice production in 1996/97 is forecast at 12,000 metric tons, 7 percent below the 1995/96 output. Less oranges are expected to be processed in 1996/97 due mainly to the expected smaller orange harvest. Production of concentrated orange juice in Greece encounters strong competition from imported frozen Brazilian product. Greek orange juice exports, which are mainly destined to Eastern Europe, are forecast at 3,500 tons in 1996/97, slightly below last season's shipments. Imports of orange juice into Greece are forecast to increase slightly in 1996/97.

Morocco

Moroccan orange juice production is forecast to decrease sharply (53 percent) to 6,801 tons in 1996/97. Processing of Clementines will likely

decrease significantly in 1996/97 because of the smaller Clementine harvest. In Morocco, the fresh export market absorbs the best quality fruit and usually provides a higher return to producers. Processing is considered the least desirable outlet as it provides the lowest return.

Currently there are 2 main citrus processors in Morocco, FRUMAT and COVEM. FRUMAT is a private company owned partly by farmers and partly by local banks. FRUMAT purchases excess production in good years and all fruit not suitable for the fresh market. COVEM, the other processor, is a subsidiary of a large citrus exporting group. It has gained a significant share of the local juice market in recent years particularly in consumer oriented fruit juices.

Orange juice exports in 1995/96 are forecast at 6,500 tons, down 19 percent from last season's shipments, due to the expected decrease in production. Morocco's orange juice is normally exported to the EU, mainly France and Germany.

Turkey

Turkish orange juice production in 1995/96 is forecast at 10,000 tons, up 19 percent from the 1995/96 output, based on the expected larger orange crop. In Turkey, about 8 percent of total orange production is processed into juice. Most of the processed juice is used for frozen concentrate. Orange juice exports in 1996/97 are forecast to increase slightly to 8,000 tons.

Major Importing Countries

Japan

Japan's imports of orange juice in 1995/96 fell 18 percent to 90,600 tons due to reduced domestic demand. The overall market for fruit juices has been stagnating due to expanding consumption of sugar-free beverages. While fruit juice beverages were previously consumed as health drinks, today demand is shifting to low-calorie beverages as more and more people take up dieting. Japanese consumers drink only about one-quarter as much orange juice as their American counterparts, and well less than one-half as much as West Europeans.

Brazil is the major supplier accounting for about 80 percent of total Japanese imports of orange juice. The United States ranks second with a 20 percent share. A Brazilian bulk orange juice storage terminal, inaugurated in 1993, has been operating at less than capacity. Japanese importers have found it more economical to receive FCOJ imports in 200 liter drums.

Japanese imports of single strength orange juice (SSOJ), although small compared to FCOJ, have increased significantly in recent years. Imports of SSOJ are expected to continue strong as consumers show a growing preference for more natural and fresh orange juice taste. The United States supplies the vast majority of Japan's imports of SSOJ.

Korea

Korean orange juice imports in 1996/97 are forecast at 54,000 tons, about the same as last season's imports. As a result of the Record of Understanding signed between Korea and the United States on Agricultural Market Access in the Uruguay Round, orange juice imports will be liberalized on July 1, 1997, with a bound 60 percent import duty, the only remaining barrier. For January-June, 1997, Korea will provide an access quota of 30,000 tons for orange juice. The access quota for 1996 was 55,000 tons.

Brazil and the United States are the primary suppliers of orange juice to Korea, accounting for about 78 and 21 percent, respectively, of total Korean imports in 1995/96. U.S. market share rebounded slightly in 1995/96. This may reflect some movement toward purchasing for quality instead of strictly on a price basis as an increasing number of consumers switch to higher quality juice.

Major Producers in the Southern Hemisphere

It is too early to make reliable forecasts for

Southern Hemisphere countries in 1996/97 (1997 harvest).

Brazil

Brazil's 1995/96 (1996) orange juice production estimate (marketed in 1996/97) is unchanged from the previous forecast. However, Brazil's orange juice export forecast for 1996 (Brazilian marketing year July 1996 - June 1997) is reduced from 1.075 to 1.050 million tons based on likely lower exports to the United States due to the expected larger U.S. production.

According to industry sources, there are approximately 1,030 FCOJ extractors in Brazil, with 80 percent of total industry capacity currently in use. Some producers have been investing in new citrus processing plants (eg., Sucorrico, Kiki, and Frucamp). The investments are a result of the delicate relationship between producers and traditional processing plants, due to the end of the master contract for purchasing oranges. Sucorrico, a company comprised of 100 orange growers, started its crushing activities last September.

Some traditional and new companies have been investing in the domestic Brazilian market and are leasing and buying fresh orange juice extractors. Many food companies, such as Nestle and Parmalat, are marketing not from-concentrate orange juice, taking advantage of consumer awareness of these companies.

The company Sucocitrico Cutrale Ltd. purchased two juice processing plants from Coca-Cola Foods in Florida. The plants will be managed by a new company, Cutrale Citrus Juices USA, Inc., which will continue supplying orange juice for the Coca-Cola brand named Minute Maid.

In September, 1996, the Government of Brazil eliminated the 8.45 percent value-added tax (ICMS) on exports of raw materials and "semi-manufactured" products, including orange juice products. According to industry officials, the ICMS exemption represents annual savings of approximately US$110 million to the citrus industry or US$0.39 per 40.8 kilo box.

(For more information on supply, distribution, and trade, contact Joseph Somers at 202-720-2974. For information on U.S. marketing opportunities, contact Ted Goldammer at 202-720-8498.)

Table 1
ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING COUNTRIES IN NORTHERN HEMISPHERE
METRIC TONS, 65 DEGREES BRIX 1/

Country/Year 2/	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
Greece 3/						
1992/93	5,200	11,800	7,969	2,798	14,071	8,100
1993/94	8,100	7,960	7,217	2,994	14,500	5,783
1994/95	5,783	11,800	7,793	3,502	16,500	4,583
1995/96	5,374	12,900	5,500	4,000	16,800	3,258
1996/97 F	2,974	12,000	6,000	3,500	16,800	3,258
Israel 4/ 5/						
1992/93	554	19,014	7,384	20,306	5,538	1,108
1993/94	1,108	16,799	7,384	16,614	7,384	1,292
1994/95	1,292	18,000	3,692	16,614	5,538	832
1995/96	832	19,800	3,692	16,614	6,461	1,249
1996/97 F	1,249	19,800	3,692	16,614	6,461	1,666
Italy 6/						
1992/93	29,709	38,475	2,924	16,006	20,782	34,320
1993/94	34,320	34,628	3,386	18,006	21,546	32,782
1994/95	32,782	30,780	4,001	18,930	22,316	26,317
1995/96	26,317	34,628	3,386	21,546	23,085	19,699
1996/97 F	19,699	30,780	3,540	21,238	23,393	9,388
Mexico 6/						
1992/93	5,000	25,000	0	23,000	2,000	5,000
1993/94	5,000	36,000	0	39,000	2,000	0
1994/95	0	65,000	0	60,000	2,000	3,000
1995/96	3,000	50,000	0	48,000	2,000	3,000
1996/97 F	3,000	48,000	0	46,000	2,000	3,000
Morocco 5/						
1992/93	1,287	9,063	0	3,793	1,913	4,644
1993/94	4,644	20,949	0	12,135	3,500	9,958
1994/95	9,958	3,450	1,249	6,500	4,550	3,607
1995/96	3,607	14,600	2,305	8,000	5,658	6,854
1996/97 F	6,854	6,801	2,000	6,500	6,000	3,155

Table 1 (continued)
ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING COUNTRIES IN NORTHERN HEMISPHERE
METRIC TONS, 65 DEGREES BRIX 1/

Country/Year	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
Spain 7/						
1992/93	4,000	24,000	20,000	39,000	9,000	0
1993/94	0	25,000	20,000	35,000	10,000	0
1994/95	0	48,000	20,000	53,000	15,000	0
1995/96	0	59,000	18,000	62,000	15,000	0
1996/97 F	0	57,000	18,000	60,000	15,000	0
Turkey 5/						
1992/93	2,000	8,200	1,000	250	8,950	2,000
1993/94	2,000	8,400	2,259	857	9,202	2,600
1994/95	2,600	9,200	2,134	1,023	9,000	3,911
1995/96	3,911	8,400	4,700	7,500	9,200	311
1996/97 F	311	10,000	8,000	8,000	9,500	811
United States 8/						
1992/93	121,010	858,678	231,969	81,153	953,391	177,113
1993/94	177,113	801,891	287,884	75,345	935,185	256,358
1994/95	256,358	894,239	141,140	83,547	1,006,893	201,297
1995/96	201,297	913,070	185,736	92,127	996,009	211,967
1996/97 F	211,967	980,000	165,000	100,000	1,025,000	231,967
TOTAL						
1992/93	168,759	994,230	271,246	186,306	1,015,645	232,284
1993/94	232,284	951,626	328,130	199,951	1,003,317	308,772
1994/95	308,773	1,080,469	180,009	243,116	1,081,797	244,338
1995/96	244,338	1,112,398	223,319	259,787	1,074,213	246,054
1996/97 F	246,054	1,164,381	206,232	261,852	1,104,154	250,661

1/ Includes all processed orange juice whether or not concentrated. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent.
2/ Year refers to marketing period which usually begins in the fall of the Northern Hemisphere and corresponds to the harvesting and marketing period for fresh citrus.
3/ Marketing season begins September 1 of first year shown.
4/ Includes orange juice processed from oranges in Gaza.
5/ Marketing season begins October 1 of first year shown.
6/ Marketing season begins January 1 of second year shown.
7/ Marketing season begins November 1 of first year shown.
8/ Marketing season begins December 1 of first year shown
F/ Forecast

Source: National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census. Florida Department of Citrus. Reports from U.S. Agricultural Counselors and Attaches and/or FAS/USDA estimates.

Table 2
ORANGE JUICE: SUPPLY & UTILIZATION, MAJOR PRODUCING COUNTRIES IN SOUTHERN HEMISPHERE
METRIC TONS, 65 DEGREES BRIX 1/

Country/Year 2/	Begin. Stocks	Production	Imports	Exports	Consumption	Ending Stocks
Argentina 3/						
1992/93	0	12,000	1,008	4,322	8,686	0
1993/94	0	12,500	2,000	890	13,610	0
1994/95	0	12,500	3,668	4,509	11,659	0
1995/96	0	11,500	4,000	4,200	11,300	0
1996/97	NA	NA	NA	NA	NA	NA
Australia 4/						
1992/93	17,309	24,742	11,178	1,174	34,684	17,371
1993/94	17,371	25,469	12,504	1,501	35,661	18,183
1994/95	18,183	14,190	21,494	1,270	36,149	16,448
1995/96	16,448	19,357	14,655	1,466	36,638	12,357
1996/97	NA	NA	NA	NA	NA	NA
Brazil 4/ 5/						
1992/93	105,000	1,118,000	0	1,100,000	18,000	105,000
1993/94	105,000	1,126,000	0	1,054,000	22,000	155,000
1994/95	155,000	1,085,000	0	1,050,000	19,000	171,000
1995/96	171,000	1,055,000	0	1,050,000	22,000	154,000
1996/97	NA	NA	NA	NA	NA	NA
South Africa 6/						
1992/93	5,389	13,475	17	4,232	9,700	4,949
1993/94	4,949	12,774	0	4,541	9,900	3,282
1994/95	3,282	12,778	0	4,550	10,100	1,410
1995/96	1,410	13,475	0	3,675	10,000	1,210
1996/97	NA	NA	NA	NA	NA	NA
TOTAL						
1992/93	127,698	1,168,217	12,203	1,109,728	71,070	127,320
1993/94	127,320	1,176,743	14,504	1,060,932	81,171	176,465
1994/95	176,465	1,124,468	25,162	1,060,329	76,908	188,858
1995/96	188,858	1,099,332	18,655	1,059,341	79,938	167,567
1996/97	NA	NA	NA	NA	NA	NA

1/ Includes all processed orange juice whether or not concentrated. One metric ton of 65 degrees brix equals 344.8 gallons at 42 degrees brix and 1,405.88 gallons at single strength equivalent.
2/ Marketing year indicated is for aggregation purposes with countries from the Northern Hemisphere corresponding to the harvesting and marketing period for fresh citrus. For the Southern Hemisphere, orange harvest occurs entirely during the second year shown.
3/ Marketing season begins January 1 of second year shown.
4/ Marketing season begins July 1 of second year shown.
5/ Includes small quantities of tangerine juice.
6/ Marketing season begins February 1 of second year shown.
Source: National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census. Florida Department of Citrus. Reports from U.S. Agricultural Counselors and Attaches and/or FAS/USDA estimates.

Table 3
U.S. EXPORTS OF ORANGE JUICE
MARKETING YEARS 1991/92-1995/96
Metric Tons, 65 Degrees Brix[1]

Destination	1991/92	1992/93	1993/94	1994/95	1995/96
North America					
Canada	30,013	27,610	18,354	22,719	24,839
Mexico	374	241	392	251	613
Subtotal	30,388	27,852	18,746	22,970	25,452
The European Union (EU)					
France	9,619	9,577	7,849	8,027	18,469
Belgium/Luxembourg	1,032	4,601	6,610	7,810	4,550
Netherlands	423	4,255	4,648	13,234	11,557
United Kingdom	2,311	3,131	4,357	4,445	4,055
Greece	2,848	2,045	457	271	211
Germany	563	731	558	783	470
Sweden	793	1,385	915	854	219
Other	791	676	1,609	264	222
Subtotal	18,380	26,401	27,003	35,690	39,753
Other Western Europe					
Norway	2,061	2,589	2,060	1,414	870
Other	730	637	336	447	255
Subtotal	2,791	3,226	2,396	1,861	1,126
East Asia					
Japan	11,925	7,773	13,801	4,726	11,184
South Korea	3,821	6,058	4,950	3,880	4,104
Hong Kong	2,282	2,407	1,496	2,501	2,382
Taiwan	2,197	2,144	1,822	1,740	1,122
Other	1,593	1,106	797	1,567	1,381
Subtotal	21,818	19,488	22,866	14.,414	20,173
Other Countries	3,215	4,188	4,534	8,612	5,623
Grand Total	76,592	81,153	75,545	83,547	92,127

1 Data includes both frozen concentrate and single strength orange juice.

Table 4
U.S. IMPORTS OF ORANGE JUICE
MARKETING YEARS 1991/92-1995/96
Metric Tons, 65 Degrees Brix[1]

Origins	1991/92	1992/93	1993/94	1994/95	1995/96
Mexico	6,334	13,992	31,151	50,245	32,974
Belize	7,665	6,111	5,900	5,731	6,843
Honduras	2,214	2,608	1,952	4,080	4,055
Costa Rica	1,837	1,752	2,863	4,849	5,907
Brazil	182,930	204,955	243,377	73,427	132,437
Other Countries	2,485	2,641	2,641	2,808	3,520
Grand Total	203,465	231,969	287,884	141,140	185,736

1 Data includes both frozen concentrate and single strength orange juice.

WORLD FRESH CITRUS SITUATION

Citrus exports in 1996/97 from selected countries in the Northern Hemisphere are forecast at 6.2 million tons, down 4 percent from last year's shipments. Exports from Spain, the world's largest fresh citrus exporter, are forecast to decrease 8 percent due to weather-reduced orange and tangerine harvests. The United States, the world's second largest fresh citrus exporter, is expected to increase exports 7 percent in 1996/97. Higher U.S. orange exports will partially offset likely lower Spanish orange shipments. However, a record U.S. grapefruit crop and increased competition from Israeli Sweetie grapefruit will challenge exporters to expand current markets and find new ones. These factors underline the importance of market promotion efforts under the Market Access Program. Citrus for processing in the Northern Hemisphere in 1996/97 is forecast to increase 2 percent to a record 15.3 million tons. The United States, which accounts for 73 percent of total citrus processed in selected countries of the Northern Hemisphere, is expected to account for the bulk of the increase.

Summary

Northern Hemisphere

The preliminary 1996/97 forecast for Northern Hemisphere citrus production is 44.6 million tons, down slightly from 1995/96. Northern Hemisphere orange production for 1996/97 is forecast at 24.98 million tons, down 2 percent from 1995/96 based on declines in Italy, Mexico, and Spain. Tangerine production is projected at 11.78 million tons, virtually unchanged from 1995/96. Grapefruit production is forecast at 3.7 million tons, up 8 percent from 1995/96 because of a significant increase in the U.S. harvest. Lemon production is forecast down 2 percent, to 2.6 million tons, because of smaller crops in Greece and Italy. Production of other citrus, mostly limes, is forecast to increase 5 percent, to 1.5 million tons, due to substantially larger output in Mexico.

Total fresh citrus exports in 1996/97 are forecast at 6.2 million tons, down 4 percent from the 1995/96 volume. Spain and the United States are the major citrus exporters in the Northern Hemisphere. A decrease in Spanish and Moroccan exports is expected to offset likely higher U.S. exports. Reduced orange and tangerine crops, which account for the bulk of Spain's citrus exports, will likely limit its citrus export availabilities in 1996/97. However, citrus shipments from the United States, which are dominated by oranges and grapefruit, are forecast at a record of 1.25 million tons, up 7 percent from last year's shipments. Increasing market promotion efforts, rising demand from leading U.S. customers, and the relaxation of import barriers in potential markets are expected to benefit U.S. citrus shipments in 1996/97. The majority of U.S. citrus exports will continue to go to traditional markets in the Far East, North America, mainly Canada, and the EU.

Citrus processing in the Northern Hemisphere in 1996/97 is forecast to increase 2 percent to a record 15.3 million tons. The United States, which accounts for 73 percent of total citrus processed in selected countries of the Northern Hemisphere, is forecast to process a record 11.2 million tons of citrus in 1996/97, mostly oranges. A record Florida orange and grapefruit crops are spurring the increase in processing.

United States

Total citrus production in the United States in 1996/97 is forecast at 15.62 million tons, up 8 percent from last season's harvest. If realized, the U.S. 1996/97 citrus crop will be the largest crop on record. Orange production in 1996/97 is forecast at 11.4 million tons, up 6 percent from 1995/96. The majority of this increase is due to the increased production of grapefruit and processed oranges in Florida.

Total U.S. citrus exports in 1996/97 are forecast at 1.25 million tons, 7 percent above the previous year's shipments. Exports of oranges in 1996/97 are forecast at 560,000 tons, up 10 percent from last year's revised-down figure of 508,000 tons. The reported good quality of the fruit is anticipated to boost U.S. total orange and grapefruit exports in 1996/97. Orange and grapefruit exports account for about 90 percent of total U.S. citrus sales in international markets. Continuing Market Access Program efforts, increasing demand from leading U.S. customers, and the elimination of import barriers in international markets are expected to continue to benefit U.S. orange and grapefruit shipments in 1996/97.

Strong demand continues from major U.S. customers in the Far East, North America, and the EU.

Spain

The Spanish Ministry of Agriculture estimates the total Spanish citrus crop for 1996/97 at 4.0 million tons, 10 percent below last year's output. Orange production is expected to be down 16 percent; tangerines, down 9.5 percent; and lemons, down 0.4 percent. The drop in citrus production in 1996/97 is due to the result of tristeza and caterpillar miner pest. Despite production being down, fruit quality and sizes are reportedly good, due to rains in September.

Spain is the world's largest citrus exporter, accounting for 37 percent of total Northern Hemisphere exports. However, smaller orange and tangerine harvests are expected to reduce Spain's citrus exports by 9 percent in 1996/97. Most Spanish citrus is exported to other European Union countries, which account for 84 percent of total citrus exports. The bulk of these exports are expected to go to traditional markets such as Germany, France, Holland, Belgium, and the United Kingdom.

Italy

Total Italian citrus production for 1996/97 is forecast at 2.6 million tons down 25 percent from the previous year. This significant drop in production is the result of very unfavorable weather conditions. Blood orange varieties account for most of the decrease in the orange harvest. These oranges represent sixty percent of total orange production. Blond oranges such as Valencia, Navel, and Ovale apparently were less affected by the unfavorable weather.

Citrus fruit consumption in Italy is affected by supply and prices, as well as competition from other winter fruit. The 1996/97 marketing year will be affected by reduced domestic supplies, which will be partially covered by higher imports. Exports are forecast at 135,000 tons, down 22 percent from last year's volume.

Egypt

Egypt's fresh citrus production is forecast at 2.2 million tons, up 3 percent from last year's output. Orange production accounts for well over half of the total fruit production in Egypt. Orange production is centered in two large geographic regions, the fertile Nile delta, and the newly reclaimed lands. Navel oranges are the predominant variety.

Egypt's orange exports are forecast at 210,000 tons, up 2 percent from last year's shipments. Exports to the European Union continue to be limited by the uneven quality of Egyptian oranges.

Egypt's oranges are not price competitive in the international market compared to oranges from Spain and Morocco. The high price of Egyptian oranges are the result of several factors: declining productivity, the abolishment of government subsidies on insecticides, and high

shipping costs. Private sector participation in the export business however is likely to improve the quality of Egyptian exports and thus attract more diverse destinations, including the possibility of greater sales to Western European markets.

Turkey

Production in 1996/97 is forecast at 2.0 million tons, up 16 percent from the previous year. Lemon, mandarin, orange, and grapefruit production is expected to increase by 7,15, 20, and 25 percent respectively, due to the combination of good weather and increased area. Citrus area in Turkey is expanding at a rate of about 5 percent annually. The expansion is driven by domestic demand, including demand from the growing tourist industry, as well as export demand, particularly for lemons and tangerines. Expansion of all varieties, particularly mandarins and grapefruit is expected to continue for the foreseeable future.

Many observers believe that Turkey has the capacity to at least double citrus area and expect farmers to continue to shift to citrus due to its more attractive returns compared to field crops, particularly in the main citrus areas of Cukurova. Production for processing is expected to continue to play a relatively minor role in the industry.

Citrus exports in 1996/97 are expected to increase to 400,000 tons, up 7 percent from the previous marketing year. The European Union continues to be Turkey's main export destination for fresh citrus. Exports of second grade produce to the Former Soviet Union continue to increase.

Greece

Greece's citrus production in 1996/97 is forecast at 1.06 million tons, down 2 percent from the revised 1995/96 output. Oranges account for about 80 percent of total Greek citrus production. The principal orange varieties grown in Greece are Washington navels, Common variety, Valencia, and Navelina.

Total citrus exports in 1996/97 are forecast to decrease 4 percent to 395,000 tons based on the smaller harvest. Greece continues to face strong competition from other Mediterranean basin countries in promoting and selling its citrus produce in the European Union and abroad. The EU continues to subsidize exports to Eastern European countries, including shipments to Russia. However, this subsidy was lowered in October and November of 1996 and is expected to diminish as the season progresses.

Morocco

Total citrus production in 1996/97 is expected to drop by about one fifth, to 1.1 million tons, from the year before. The main reason for this decline is the alternate bearing nature of the citrus trees. Citrus exports are forecast to fall 19 percent to 460,000 tons.

In February 1996, Morocco signed an Association Accord with the EU which allows Moroccan agricultural products, including fresh citrus and juice to continue to receive preferential duties when exported to the EU. More recently, Moroccan exporters have been concerned by the EU decision to require EU citrus importers to obtain an import certificate for fresh citrus fruit imported from non-EU countries. This EU requirement may discourage some customers from importing from Morocco.

Cyprus

Citrus production in Cyprus for 1996 has changed little from the previous four years. For the 1996/97 marketing year, production in fresh oranges is forecast to decline to 150,000 tons, down 9 percent from the previous output. This drop in production is due to dry weather conditions.

Cyprus fresh orange exports are forecast to drop by 13 percent to 70,000 tons in 1996/97. Cyprus' exports primarily to Europe. The Turkish Republic of Northern Cyprus (TRNC), prohibited by law from exporting to the European Union, exports most of its citrus to Turkey.

Currently, the Government of Cyprus is moving towards a support system similar to the Common Agricultural Policy as accession talks for joining the EU begin in 1998.

China

Both China's fresh orange and fresh tangerine production are forecast to increase 6 percent to 1.8 million and 5.6 million tons respectively in 1996/97. Area planted for citrus crops continues to increase in most provinces as farmers seek new cash crops. In addition, a combination of rising consumer income and crop diversification has led to China's increase in total fruit production. Production increased in every province except Guandong.

China's wealthier urban consumers have one of the highest per capita levels of fresh fruit consumption in the world. Fruit is consumed with most meals and is popular as a snack. Rising incomes are increasing the number of consumers who can purchase fresh fruit. However, a growing availability of processed snack foods is creating competition in the fresh fruit market.

Total citrus exports, mostly tangerines, are forecast at 156,000 tons, in 1996/97, up 7 percent from last year's volume. Tangerine exports are forecast at 140,000 tons, up 8 percent from 1995/96 shipments. China's main export markets remain Southeast Asia and the Former Soviet Union.

Although fresh citrus imports face phytosanitary barriers and high tariffs, substantial amounts of U.S., South African, and Australian navels and Valencia oranges are transshipped through Hong Kong to China. Tariffs are very high, but it can be assumed from the selling price of the citrus in the wholesale market, which is not much above the Hong Kong price, that the official tariffs are rarely collected.

Mexico

Mexican citrus production is forecast to decrease 3 percent in 1996/97. Oranges account for the overall decrease in citrus output. Orange production is forecast at 2.8 million tons, down 7 percent from the previous year. Dry weather conditions that affected the northern states of Mexico affected overall yields. Tangerine production is forecast to remain at the same level as last year. Grapefruit production is forecast to increase 3 percent to 150,000 tons in 1996/97. Lime production is forecast to increase 9 percent to 960,000 tons in 1996/97 because of better weather conditions and more trees coming into production.

Fresh orange consumption in Mexico is forecast down 7 percent in 1996/97 due to lower supplies. However, as the Mexican economy recovers, consumer purchasing power is expected to be stronger.

Exports of fresh oranges in 1996/97 are forecast at 8,000 tons, down 11 percent from the previous year. The United States is the largest export market for Mexican oranges. Mexican exporters are also exploring Asian markets such as Hong Kong and Japan. Mexican imports of U.S. oranges could increase significantly given the reduction in the Mexican tariff.

Japan

Japanese total citrus production in 1996/97 is forecast at 1.6 million tons, 8 percent below the 1995/96 output. The tangerine crop which comprises the majority of the citrus production is forecast at 1.5 million tons, down 8.5 percent from the previous year's output. The decrease in production is due largely to poor flowering and pollination caused by the cold weather in early Spring as well as fruit drop during the summer. A decline in the area harvested continues the long-term trend of contraction in Japan's once dominant mikan industry. The aging farm population and product substitution losses to juice and processed "snack" food are undoubtedly key factors in the downtrend.

Japan's total citrus imports in 1996/97 are forecast at 564,000 tons, up 7 percent from the previous year's level. The United States remains the dominant supplier of fresh oranges, grapefruit, and lemons to Japan. However, the United States is faced with two key competitors in the Japanese fresh orange market: Australia and South Africa. Fresh oranges from both countries have been gaining a steady reputation among Japanese traders in terms of both quality and price. Suppliers in these countries tend to

ship after the main growing season for U.S. oranges, but may increasingly be encroaching on the traditional sales period for California fruit. Israel is the United States' largest competitor in Japan for grapefruit. Imports from Israel have increased approximately 26 percent from last year. The majority of Israel's exports to Japan are the green-skinned "Sweetie" grapefruit. It is estimated that imports from Israel will grow 10-12 percent, reaching 25,000 tons. The future of the United States' export success will depend heavily on the quality of fruit and on continued marketing efforts to expand the range of uses.

Korea

Korean tangerine production in 1996/97 is forecast at 550,000 tons, down 11 percent compared to the revised 1995/96 estimate of 615,000 tons. However, production in 1996/97 is much higher than was expected in the spring, as ideal summer and fall weather helped offset frost damage which occurred during the spring blossom season. The favorable weather also contributed to good quality fruit. Planted area is forecast at 25,500 hectares, up slightly from the revised upward 1995/96 figure. However, producers in the Cheju Province are expected to continue a vigorous tree-thinning program. This program comes as a result of growers' decisions to improve tangerine quality in order to compete with high-quality orange imports. Cheju Province accounts for more than 90 percent of total Korean tangerine production.

Korea is expected to export 3,000 tons of tangerines in 1996/97, compared to the revised 1,000 tons shipped in 1995/96. Canada and Russia are the main destinations for Korean tangerines. Korea obtained USDA/APHIS approval in 1995 to export tangerines to the United States under guidelines in the official protocol agreement. Korea is hoping to expand their export shipments to the United States. For 1996/97, Korea hopes to export 300 tons to the United States.

Korea imported oranges for the first time, other than for the hotel trade, in 1994/95 under terms of its Uruguay Round agreement. A total quota of 15,000 tons for oranges was assigned in 1994/95. U.S. orange and grapefruit exports to Korea increased sharply in 1995/96 as a result of this agreement. However, there were a number of problems that arose with the initial oranges imported in 1995. The key issue was the timing of imports and the import clearance delays. Significant progress has been made on both of these issues, leading to a much smoother import clearance process throughout 1996. The Korean quota is 25,000 tons for the first six months of 1997 until liberalization in July 1997.

Revised Southern Hemisphere

It is too early to make reliable forecasts for the Southern Hemisphere countries for the 1996/97 season (harvest in 1997).

Total citrus production in selected countries in the Southern Hemisphere in 1995/96 (harvest in 1996) has been revised up from the January forecast to 42.2 million tons. In ***Brazil***, the 1995 citrus crop for the entire country has been revised to 17.6 million tons, down slightly from the previous year's output of 17.8 million tons. Fresh orange consumption has been revised down 3.5 percent due to a decrease in production.

South Africa's 1995/96 orange crop has been revised up 7.7 percent from 850,000 (1994/95) to 930,000 tons. It is forecast that 1996 production increased due to young trees that came into production, and the good rain conditions that fell into the drought prone provinces of Mpumalanga and northern Transvaal. Total 1995/96 citrus production in ***Argentina*** is revised down by 11 percent to 1.8 million tons. The drop in production is due to prolonged drought in citrus producing zones and frosts.

For further information on supply, distribution, and trade contact Debbie Seidband, Horticultural and Tropical Products Division, (202) 720-6877. For information on U.S. marketing opportunities, contact Ted Goldammer at 202-720-8498. For information on production contact Kelly Strezlecki, Production Estimates Division at (202) 720-6791.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 1: TOTAL CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere					
Mediterranean Basin					
Cyprus 4/					
1994/95	301	0	163	43	95
1995/96	316	0	163	46	107
1996/97	288	0	150	48	90
Egypt 4/					
1994/95	2,066	0	194	1,855	17
1995/96	2,145	0	218	1,907	20
1996/97	2,201	0	225	1,956	20
Gaza 4/					
1994/95	104	0	95	9	0
1995/96	104	0	95	9	0
1996/97	104	0	95	9	0
Greece					
1994/95	1,151	9	430	482	248
1995/96	1,084	10	410	423	261
1996/97	1,060	9	395	410	264
Israel					
1994/95	1,003	28	337	158	536
1995/96	1,052	23	342	191	542
1996/97	1,052	23	343	190	542
Italy					
1994/95	2,853	154	199	2,008	800
1995/96	3,445	116	241	2,346	974
1996/97	2,595	183	187	1,789	802
Morocco 4/					
1994/95	995	0	384	576	35
1995/96	1,436	0	566	775	95
1996/97	1,136	0	460	606	70
Spain					
1994/95	5,040	65	2,885	1,381	839
1995/96	4,445	76	2,485	1,125	911
1996/97	4,014	77	2,277	1,140	674
Turkey 4/					
1994/95	1,880	38	391	1,339	188
1995/96	1,775	50	375	1,273	177
1996/97	2,050	0	400	1,446	204
Subtotal Mediterranean Basin					
1994/95	15,393	294	5,078	7,851	2,758
1995/96	15,802	275	4,895	8,095	3,087
1996/97	14,500	292	4,532	7,594	2,666
Other Northern Hemisphere					
China, People's Republic of					
1994/95	6,056	0	134	5,619	303
1995/96	7,236	4	146	6,733	361
1996/97	7,693	6	156	7,158	385
Cuba					
1994/95	600	0	95	323	182
1995/96	650	0	105	358	187
1996/97	600	0	95	323	182
Japan					
1994/95	1,685	554	6	2,138	95
1995/96	1,764	525	6	2,104	179
1996/97	1,625	564	6	2.035	148

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 1: TOTAL CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Korea, Republic of					
1994/95	549	0	1	517	31
1995/96	615	1	1	568	47
1996/97	550	2	3	519	30
Mexico					
1994/95	4,894	4	170	3,775	953
1995/96	4,206	5	165	3,345	701
1996/97	4,091	4	173	3,238	684
United States					
1994/95	14,328	189	1,214	2,890	10,413
1995/96	14,516	191	1,166	3,168	10,373
1996/97	15,552	182	1,247	3,300	11,187
Subtotal Other Northern Hemisphere					
1994/95	28,112	747	1,620	15,262	11,977
1995/96	28,987	726	1,589	16,276	11,848
1996/97	30,111	758	1,680	16,573	12,616
Total Northern Hemisphere					
1994/95	43,505	1,041	6,698	23,113	14,735
1995/96	44,789	1,001	6,484	24,371	14,935
1996/97	44,611	1,050	6,212	24,167	15,282
Southern Hemisphere					
Argentina					
1994/95	2,005	4	258	1,067	684
1995/96	1,785	7	297	859	636
1996/97	NA	NA	NA	NA	NA
Australia					
1994/95	622	8	99	177	354
1995/96	505	12	84	174	259
1996/97	NA	NA	NA	NA	NA
Brazil					
1994/95	17,812	0	91	6,469	11,252
1995/96	17,638	0	91	6,704	10,843
1996/97	NA	NA	NA	NA	NA
South Africa					
1994/95	987	0	581	182	224
1995/96	1,173	0	753	142	278
1996/97	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1994/95	21,426	12	1,029	7,895	12,514
1995/96	21,101	19	1,225	7,879	12,016
1996/97	NA	NA	NA	NA	NA
Total World					
1994/95	64,931	1,053	7,727	31,008	27,249
1995/96	65,890	1,020	7,709	32,250	26,951
1996/97	NA	NA	NA	NA	NA

1/ Forecast
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.
4/Estimates carried over from July 1996 circular

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 2: FRESH ORANGES

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere						
Mediterranean Basin						
Cyprus						
	1994/95	166	0	76	30	60
	1995/96	170	0	76	30	64
	1996/97	165	0	80	30	55
Egypt						
	1994/95	1,513	0	183	1,322	8
	1995/96	1,555	0	206	1,339	10
	1996/97	1,608	0	210	1,388	10
Gaza 4/						
	1994/95	87	0	81	6	0
	1995/96	87	0	81	6	0
	1996/97	87	0	81	6	0
Greece						
	1994/95	930	3	375	334	224
	1995/96	870	2	330	294	248
	1996/97	850	2	325	277	250
Israel						
	1994/95	405	20	182	43	200
	1995/96	472	15	174	93	220
	1996/97	472	15	175	92	220
Italy						
	1994/95	1,800	45	129	1,206	510
	1995/96	2,200	36	135	1,451	650
	1996/97	1,515	100	100	1,015	500
Morocco						
	1994/95	657	0	240	382	35
	1995/96	1,013	0	378	554	81
	1996/97	780	0	300	420	60
Spain						
	1994/95	2,697	49	1,350	871	525
	1995/96	2,434	50	1,124	730	630
	1996/97	2,153	50	1,000	750	453
Turkey						
	1994/95	920	36	112	752	92
	1995/96	840	50	100	706	84
	1996/97	1,000	0	110	790	100
Subtotal Mediterranean Basin						
	1994/95	9,175	153	2,728	4,946	1,654
	1995/96	9,641	153	2,604	5,203	1,987
	1996/97	8,630	167	2,381	4,768	1,648
Other Northern Hemisphere						
China						
	1994/95	1,633	0	17	1,534	82
	1995/96	1,727	4	16	1,629	86
	1996/97	1,836	6	16	1,734	92
Cuba						
	1994/95	350	0	40	235	75
	1995/96	380	0	40	265	75
	1996/97	350	0	40	235	75
Japan						
	1994/95	30	182	0	210	2
	1995/96	26	152	0	176	2
	1996/97	27	185	0	210	2

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 2: FRESH ORANGES

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
Mexico						
	1994/95	3,570	1	10	2,811	750
	1995/96	3,000	2	9	2,493	500
	1996/97	2,800	1	8	2,313	480
United States 5/						
	1994/95	10,474	18	576	1,461	8,455
	1995/96	10,723	23	508	1,727	8,511
	1996/97	11,333	20	560	1,678	9,115
Subtotal Other Northern Hemisphere						
	1994/95	16,057	201	643	6,251	9,364
	1995/96	15,856	181	573	6,290	9,174
	1996/97	16,346	212	624	6,170	9,764
Total Northern Hemisphere						
	1994/95	25,232	354	3,371	11,197	11,018
	1995/96	25,497	334	3,177	11,493	11,161
	1996/97	24,976	379	3,005	10,938	11,412
Southern Hemisphere						
Argentina						
	1994/95	712	1	83	471	159
	1995/96	580	1	72	359	150
	1996/97	NA	NA	NA	NA	NA
Australia						
	1994/95	588	6	95	160	339
	1995/96	470	10	80	157	243
	1996/97	NA	NA	NA	NA	NA
Brazil						
	1994/95	16,520	0	82	5,418	11,020
	1995/96	16,360	0	82	5,670	10,608
	1996/97	NA	NA	NA	NA	NA
South Africa /6						
	1994/95	770	0	445	159	166
	1995/96	930	0	595	121	214
	1996/97	NA	NA	NA	NA	NA
Total Southern Hemisphere						
	1994/95	18,590	7	705	6,208	11,684
	1995/96	18,340	11	829	6,307	11,215
	1996/97	NA	NA	NA	NA	NA
Total World						
	1994/95	43,822	361	4,076	17,405	22,702
	1995/96	43,837	345	4,006	17,800	22,376
	1996/97	NA	NA	NA	NA	NA

1/ Forecast
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.
4/Tangerine production is small and is included with oranges
5/ Includes Temples
6/ Includes small qantities of tangerines

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 3: FRESH TANGERINES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere					
Mediterranean Basin					
Egypt					
1994/95	250	0	0	247	3
1995/96	256	0	3	250	3
1996/97	258	0	5	250	3
Greece					
1994/95	84	0	15	67	2
1995/96	84	0	20	62	2
1996/97	85	0	20	63	2
Israel					
1994/95	117	0	30	50	37
1995/96	125	0	38	42	45
1996/97	125	0	38	42	45
Italy					
1994/95	468	54	24	463	35
1995/96	528	33	52	459	50
1996/97	460	35	50	400	45
Morocco 4/					
1994/95	304	0	142	162	0
1995/96	389	0	187	188	14
1996/97	330	0	160	160	10
Spain					
1994/95	1,784	1	1,198	390	197
1995/96	1,563	1	1,033	325	206
1996/97	1,414	2	950	320	146
Turkey					
1994/95	430	0	102	285	43
1995/96	450	0	105	300	45
1996/97	520	0	110	358	52
Subtotal Mediterranean Basin					
1994/95	3,437	55	1,511	1,664	317
1995/96	3,395	34	1,438	1,626	365
1996/97	3,192	37	1,333	1,593	303
Other Northern Hemisphere					
China					
1994/95	4,423	0	117	4,085	221
1995/96	5,509	0	130	5,104	275
1996/97	5,857	0	140	5,424	293
Cuba					
1994/95	6	0	0	6	0
1995/96	6	0	0	6	0
1996/97	6	0	0	6	0
Japan 5/					
1994/95	1,539	7	6	1,450	90
1995/96	1,626	4	6	1,450	174
1996/97	1,487	5	6	1,343	143
South Korea					
1994/95	549	0	1	517	31
1995/96	615	1	1	568	47
1996/97	550	2	3	519	30
Mexico					
1994/95	192	0	4	168	20
1995/96	170	0	4	149	17
1996/97	170	0	3	150	17

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 3: FRESH TANGERINES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
United States 6/					
1994/95	389	9	19	227	152
1995/96	415	11	22	254	150
1996/97	532	6	24	349	165
Subtotal Other Northern Hemisphere					
1994/95	7,098	16	147	6,453	514
1995/96	8,341	16	163	7,531	663
1996/97	8,602	13	176	7,791	648
Total Northern Hemisphere					
1994/95	10,535	71	1,658	8,117	831
1995/96	11,736	50	1,601	9,157	1,028
1996/97	11,794	50	1,509	9,384	951
Southern Hemisphere					
Argentina					
1994/95	344	0	27	294	23
1995/96	315	0	32	263	20
1996/97	NA	NA	NA	NA	NA
Brazil 7/					
1994/95	560	0	8	432	120
1995/96	535	0	8	407	120
1996/97	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1994/95	904	0	35	726	143
1995/96	850	0	40	670	140
1996/97	NA	NA	NA	NA	NA
Total World					
1994/95	11,439	71	1,693	8,843	974
1995/96	12,586	50	1,641	9,827	1,168
1996/97	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/ Clementines only

5/ Mainly satsumas (also called mandarin or unshu mikan, but also including mandarin hybrids.

6/ Includes tangelos which account for about half of combined tangerine and tangelo production. Export data include mandarins

7/ State of Sao Paulo only, which apparently accounts for over-half of Brazil's production. About 120,000 tons of tangerines, which are processed, are included in the orange table.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 4: FRESH GRAPEFRUIT

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1994/95	95	0	60	5	30
1995/96	108	0	60	10	38
1996/97	90	0	50	10	30
Gaza					
1994/95	9	0	7	2	0
1995/96	9	0	7	2	0
1996/97	9	0	7	2	0
Israel					
1994/95	415	5	116	30	274
1995/96	395	5	117	25	258
1996/97	395	5	117	25	258
Italy					
1994/95	5	46	7	44	0
1995/96	4	38	2	40	0
1996/97	3	39	2	40	0
Turkey					
1994/95	60	0	45	9	6
1995/96	65	0	50	9	6
1996/97	80	0	60	13	7
Subtotal Mediterranean Basin					
1994/95	584	51	235	90	310
1995/96	581	43	236	86	302
1996/97	577	44	236	90	295
Other Northern Hemisphere					
Cuba					
1994/95	230	0	55	70	105
1995/96	250	0	65	75	110
1996/97	230	0	55	70	105
Japan					
1994/95	0	272	0	272	0
1995/96	0	275	0	275	0
1996/97	0	280	0	280	0
Mexico					
1994/95	160	1	1	125	35
1995/96	145	1	2	108	36
1996/97	150	1	2	113	36
United States					
1994/95	2,642	13	487	719	1,449
1995/96	2,466	13	502	696	1,281
1996/97	2,759	6	530	760	1,475
Subtotal Other Northern Hemisphere					
1994/95	3,032	286	543	1,186	1,589
1995/96	2,861	289	569	1,154	1,427
1996/97	3,139	287	587	1,223	1,616
Total Northern Hemisphere					
1994/95	3,616	337	778	1,276	1,899
1995/96	3,442	332	805	1,240	1,729
1996/97	3,716	331	823	1,313	1,911

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE4 : FRESH GRAPEFRUIT

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Southern Hemisphere					
Argentina					
1994/95	208	3	37	135	39
1995/96	190	6	33	127	36
1996/97	NA	NA	NA	NA	NA
South Africa					
1994/95	154	0	98	16	40
1995/96	172	0	115	14	43
1996/97	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1994/95	362	3	135	151	79
1995/96	362	6	148	141	79
1996/97	NA	NA	NA	NA	NA
Total World					
1994/95	3,978	340	913	1,427	1,978
1995/96	3,804	338	953	1,381	1,808
1996/97	NA	NA	NA	NA	NA

1/ Forecast
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 5: FRESH LEMONS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1994/95	40	0	27	8	5
1995/96	38	0	27	6	5
1996/97	33	0	20	8	5
Gaza					
1994/95	8	0	7	1	0
1995/96	8	0	7	1	0
1996/97	8	0	7	1	0
Greece					
1994/95	137	6	40	81	22
1995/96	130	8	60	67	11
1996/97	125	7	50	70	12
Israel					
1994/95	26	3	3	20	6
1995/96	20	3	3	18	2
1996/97	20	3	3	18	2
Italy					
1994/95	565	9	39	295	240
1995/96	699	9	52	396	260
1996/97	610	9	35	334	250
Morocco					
1994/95	20	0	0	20	0
1995/96	20	0	0	20	0
1996/97	20	0	0	20	0
Spain					
1994/95	545	15	335	120	105
1995/96	437	25	327	70	65
1996/97	435	25	325	70	65
Turkey					
1994/95	470	2	132	293	47
1995/96	420	0	120	258	42
1996/97	450	0	120	285	45
Subtotal Mediterranean Basin					
1994/95	1811	35	583	838	425
1995/96	1772	45	596	836	385
1996/97	1701	44	560	806	379
Other Northern Hemisphere					
Japan					
1994/95	2	93	0	95	0
1995/96	2	94	0	96	0
1996/97	2	94	0	96	0
Mexico					
1994/95	11	1	0	1	11
1995/96	11	1	0	1	11
1996/97	11	1	0	1	11
United States					
1994/95	814	11	129	341	355
1995/96	900	11	131	351	429
1996/97	921	10	130	371	430

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 5: FRESH LEMONS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Subtotal Other Northern Hemisphere					
1994/95	827	105	129	437	366
1995/96	913	106	131	448	440
1996/97	934	105	130	468	441
Total Northern Hemisphere					
1994/95	2638	140	712	1275	791
1995/96	2685	151	727	1284	825
1996/97	2635	149	690	1274	820
Southern Hemisphere					
Argentina					
1994/95	741	0	111	167	463
1995/96	700	0	160	110	430
1996/97	NA	NA	NA	NA	NA
Australia					
1994/95	34	2	4	17	15
1995/96	35	2	4	17	16
1996/97	NA	NA	NA	NA	NA
Brazil 4/					
1994/95	67	0	1	0	66
1995/96	70	0	1	0	69
1996/97	NA	NA	NA	NA	NA
South Africa					
1994/95	63	0	38	7	18
1995/96	71	0	43	7	21
1996/97	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1994/95	905	2	154	191	562
1995/96	876	2	208	134	536
1996/97	NA	NA	NA	NA	NA
Total World					
1994/95	3543	142	866	1466	1353
1995/96	3561	153	935	1418	1361
1996/97	NA	NA	NA	NA	NA

1/ Forecast
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons usualy begins earlier and often extends throughout the year.
4/ State of Sao Paulo only.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 6: OTHER CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere					
Mediterranean Basin					
Egypt 4/					
1994/95	303	0	11	286	6
1995/96	334	0	9	318	7
1996/97	335	0	10	318	7
Israel					
1994/95	40	0	6	15	19
1995/96	40	0	10	13	17
1996/97	40	0	10	13	17
Italy 5/					
1994/95	15	0	0	0	15
1995/96	14	0	0	0	14
1996/97	7	0	0	0	7
Morocco					
1994/95	14	0	2	12	0
1995/96	14	0	1	13	0
1996/97	6	0	0	6	0
Spain 6/					
1994/95	14	0	2	0	12
1995/96	11	0	1	0	10
1996/97	12	0	2	0	10
Subtotal Mediterranean Basin					
1994/95	386	0	21	313	52
1995/96	413	0	21	344	48
1996/97	400	0	22	337	41
Other Northern Hemisphere					
Cuba 4/					
1994/95	14	0	0	12	2
1995/96	14	0	0	12	2
1996/97	14	0	0	12	2
Japan 7/					
1994/95	114	0	0	111	3
1995/96	110	0	0	107	3
1996/97	109	0	0	106	3
Mexico 8/					
1994/95	961	1	155	670	137
1995/96	880	1	150	594	137
1996/97	960	1	160	661	140
United States 8/					
1994/95	9	138	3	142	2
1995/96	12	133	3	140	2
1996/97	7	140	3	142	2
Subtotal Other Northern Hemisphere					
1994/95	1,098	139	158	935	144
1995/96	1,016	134	153	853	144
1996/97	1,090	141	163	921	147
Total Northern Hemisphere					
1994/95	1,484	139	179	1,248	196
1995/96	1,429	134	174	1,197	192
1996/97	1,490	141	185	1,258	188

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1994/95 - 1996/97 1/
(1,000 METRIC TONS)
TABLE 6: OTHER CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Southern Hemisphere					
Brazil 9/					
1994/95	665	0	0	619	46
1995/96	673	0	0	627	46
1996/97	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1994/95	665	0	0	619	46
1995/96	673	0	0	627	46
1996/97	NA	NA	NA	NA	NA
Total World					
1994/95	2,149	139	179	1,867	242
1995/96	2,102	134	174	1,824	238
1996/97	NA	NA	NA	NA	NA

1/ Forecast
2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.
3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of limes usually begins earlier and often extends throughout the year.
4/ Mostly limes but some sour oranges and other varieties.
5/ Mostly bergamots.
6/ Sour oranges.
7/ Summer oranges (Natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo).
8/ Limes
9/ Limes, states of Sao Paulo only, which apparently accounts for roughly 80 percent of Brazil's lime production.

U.S. EXPORTS OF FRESH ORANGES
MARKETING YEARS 1991/92-1995/96[1/]
Metric Tons

Destination	1991/92	1992/93	1993/94	1994/95	1995/96
North America					
Canada	170,992	206,881	188,551	178,854	176,012
Mexico	81	64	901	1,949	3,474
Subtotal	**171,073**	**206,945**	**189,452**	**180,803**	**179,486**
The European Union (EU)					
The Netherlands	3,926	646	1,298	1,141	1,522
United Kingdom	702	466	730	79	550
Other	874	240	109	937	185
Subtotal	**5,502**	**1,352**	**2,137**	**2,157**	**2,257**
East Asia					
Japan	166,214	161,786	158,170	168,591	124,446
Hong Kong	97,028	128,569	124,417	128,098	101,408
Taiwan	16,600	11,675	21,186	22,211	14,945
Singapore	14,435	14,936	15,675	18,282	16,196
Malaysia	11,131	11,801	12,236	14,968	16,970
Other	4,531	7,666	11,732	25,376	35,368
Subtotal	**309,939**	**336,433**	**343,416**	**377,526**	**309,333**
Oceania					
Australia	4,421	5,723	6,265	7,018	8,919
New Zealand	2,970	4,692	4,352	6,448	4,698
Other	162	151	61	176	65
Subtotal	**7,553**	**10,566**	**10,678**	**13,642**	**13,682**
Other Countries	**1,148**	**1,052**	**2,358**	**1,988**	**3,638**
Grand Total	**495,215**	**556,348**	**548,041**	**576,116**	**508,396**

1/ Marketing season begins November of first year shown.
Source: U.S. Bureau of the Census

U.S. EXPORTS OF FRESH GRAPEFRUIT
MARKETING YEARS 1991/92-1995/96 1/
Metric Tons

Destination	1991/92	1992/93	1993/94	1994/95	1995/96
North America					
Canada	68,260	69,444	74,378	77,472	72,102
Mexico	31	0	120	1,639	1,257
Subtotal	**68,291**	**69,444**	**74,498**	**79,111**	**73,359**
The European Union (EU)					
France	53,096	51,050	39,454	43,428	54,680
The Netherlands	29,395	29,021	26,469	33,908	47,857
Belgium-Luxembourg	6,561	14,567	15,849	9,934	11,201
United Kingdom	10,885	10,484	9,585	12,484	9,652
Germany	7,014	10,833	8,861	15,250	14,686
Sweden	1,137	1,202	896	587	1,011
Other	1,329	910	713	864	1,070
Subtotal	**108,280**	**116,865**	**100,931**	**116,455**	**140,157**
Other Western Europe					
Switzerland	2,683	2,870	876	392	534
Other	74	251	358	104	104
Subtotal	**3,894**	**4,323**	**2,130**	**496**	**638**
East Asia					
Japan	253,666	222,775	250,229	246,310	242,518
Taiwan	16,850	18,025	18,567	21,629	23,236
Korea	4,918	4,931	7,589	15,219	5,416
Hong Kong	1,946	2,330	2,459	4,163	10,170
Other	637	1,078	653	1,034	1,573
Subtotal	**278,017**	**249,139**	**279,497**	**288,355**	**282,913**
Other Countries	**699**	**1,232**	**1,653**	**1,467**	**2,883**
Grand Total	**459,181**	**441,003**	**458,709**	**485,884**	**499,950**

1/ Marketing season begins September of first year shown.
Source: U.S. Bureau of the Census

U.S. Fresh Vegetable Exports Down in FY 1996, But Prospects for FY 1997 are More Favorable

U.S. fresh vegetable exports (including potatoes) in fiscal year 1996 were valued at $979 million, the third largest export value in history, but down 14 percent from the record in FY 1995. Although the value of vegetable exports was down considerably because of lower unit values, and a recovery in Japanese and Korean production, the volume of exports dropped only 3 percent for the previous year. Canada was once again the top market for U.S. vegetable exports, followed by Japan, Mexico, EU-15 and other Asian countries. Lettuce, tomatoes, onions, broccoli, asparagus, bell peppers, celery and cauliflower topped the list for all U.S. vegetable exports. As consumer incomes rise and modern supermarkets appear in emerging markets, particularly in Asia, opportunities for other types of vegetable products such as pre-cut vegetables likely will appear. The potential for expanding U.S. sales of tomatoes, peppers and eggplants into Japan appears possible as both governments work to overcome existing trade barriers.

Canada remains top U.S. market for fresh vegetable sales

In fiscal year 1996 (October 1995 to September 1996), the value of U.S. vegetable exports to Canada, the top market, declined 15 percent to $648 million, due mainly to lower export volumes and lower unit values combined with inelastic demand. In addition, increased competition from Mexico for vegetables such as tomatoes, cauliflower, broccoli, lettuce and asparagus, reduced U.S. shipments to Canada.

Canada remains the most important market for U.S. fresh vegetable exports, but its share of exports has fallen from three quarters to two-thirds in recent years. Lettuce and tomatoes top the list of vegetables sold to our northern neighbor. Bell peppers, broccoli and onions round out the top 5 U.S. vegetables sold.

U.S. vegetable exports to Asia slow, but opportunities remain good

Although U.S. exports of fresh vegetable sales to Asia slowed in FY 1996, good opportunities remain for top quality vegetables in Japan, Hong Kong, Taiwan, Singapore and Korea. The greatest demand for U.S. fresh vegetable products in Asia are linked to traditional export items, such as lettuce, broccoli, asparagus, onions and celery.

U.S. exports to Japan in FY 1996 were down 20 percent to $166 million from a record $207 million in FY 1995, due mainly to the E-Coli crisis in Japan which impacted heavily on imported vegetables. Because of the E-Coli problem in August 1996, the Japanese government imposed a new health inspection program on 13 imported vegetables. Vegetables generally eaten raw were affected the most. The commodities affected included: lettuce, broccoli, garlic, burdock root, tomatoes, peppers, cabbage, asparagus, ginger, onions, carrots, and shallots. The United States is currently not permitted to export fresh tomatoes and peppers to Japan because of prevailing phytosanitary issues. During the past 5 years, Japan has accounted for more than 75 percent of all U.S. fresh vegetable exports to Asia.

The top four U.S. vegetables exported to Hong

Kong were lettuce, onions, celery and broccoli. U.S. exports of these four vegetables to Hong Kong and Taiwan combined increased 85 percent from $16 million in FY 1992 to more than $30 million in FY 1996.

Lettuce continues to top U.S. vegetable exports

In FY 1996, U.S. exports of **lettuce** totaled 286,000 tons valued at $133 million, up 4 percent in volume but down 28 percent in value from the previous year. Exports to Canada, the top market, valued at $104 million, declined 34 percent from FY 1995. However, exports to Hong Kong, the number two market, valued at $11 million, were up 22 percent from FY 1995. Exports to Mexico, valued at $6 million, rebounded 50 percent from FY 1995, which was down as a result of the value of the U.S. dollar relative to the devalued Mexican peso. Exports to Singapore and Taiwan have registered significant increases from FY 1992 to present.

Onions exports down

In FY 1996, U.S. **onion** exports, including sets, valued at $83 million, were down 37 percent from FY 1995, mainly due to reduced shipments to Japan, Canada, Korea and Mexico. These markets accounted for over 80 percent of the total U.S. export value of onions in FY 1996. Improved weather conditions and a larger domestic harvest in Hokkaido, Japan was the primary factors that lead to reduced U.S. onion shipments in FY 1996. Hokkaido onions are normally brought to market in the early part of the season (September and October). Decreased value of U.S. onion exports to Canada and Mexico were largely due to lower volumes shipped.

Broccoli, celery, asparagus and peppers also down

In FY 1996, U.S. exports of **broccoli** valued at $84 million were down 7 percent from the previous year. Exports to Canada, the top U.S. market, accounting for about 48 percent of the total value in FY 1996, declined 20 percent from FY 1995. However, U.S. broccoli exports to Japan, the second largest market, increased 9 percent from the previous year.

U.S. exports of **celery** in FY 1996, valued at $39 million, dropped by 32 percent from FY 1995, due largely to lower unit value in product shipped to Canada. Canada accounted for 72 percent of U.S. celery exports in FY 1996. However, U.S. celery shipments to Hong Kong, the number two market, valued at $5.8 million, up 5 percent from FY 1995, increased for the fourth consecutive year.

U.S. exports of fresh **asparagus**, valued at $52 million, declined 22 percent from FY 1995, primarily due to the lower unit value and smaller shipments to Japan, the top U.S. market. The unit value of asparagus shipments to Canada, the second largest market, declined by 14 percent. Reduced shipments to Japan were caused largely by the E-Coli crisis. During the same period, U.S. asparagus exports to Switzerland, the third largest market, valued at almost $7 million, increased 75 percent above FY 1995. Greater market potential for U.S. fresh green asparagus in the EU, especially in France, are possible, provided that prices are competitive. The primary suppliers of imported asparagus, mostly white, to France is Spain, Greece, Italy, Peru and Morocco. Fresh asparagus in France is mainly marketed from mid-March to the beginning of July.

In FY 1996, U.S. exports of **bell peppers** valued at $46 million, declined 6 percent from FY 1995. Declining unit value was the main factor for this decrease. Canada accounted for 98 percent of all U.S. fresh pepper exports in FY 1996.

Tomato exports also slow

U.S. exports of fresh **tomatoes** in FY 1996, valued at $100 million, down 9 percent from the previous year, continued a downward trend for the third consecutive year. This decline in value was due mostly to reduced unit value in exports to Canada and Mexico. Mexican exports of vine-ripe tomatoes to Canada have also impacted on the share of the Canadian market. Canadian imports of Mexican tomatoes have grown from $8.9 million in CY 1993 to US $25.7 million in January to October 1996. Canada accounted for 94 percent of the total value in FY 1996, while, decreased value of U.S. exports to Mexico, continue to

reflect on the 1994 peso devaluation.

Access for U.S. fresh tomatoes to Japanese market possible in 1997

U.S. fresh tomato exports to Japan are currently banned, due to Japanese concerns over the possible transmission of tobacco blue mold (TBM). However, due to long standing efforts of USDA and Japanese officials to address the TMB issue, it is possible that U.S. fresh tomatoes could gain entry into the Japanese market later in 1997.

Japan's tomato production consists primarily of hothouse tomatoes.

For further information call Emanuel McNeil at (202) 720-2083

Top Markets For U.S. Fresh Vegetables Exports 1/, FY1991/92 - FY1995/96
(Value in $1,000)

Country	1991/92	1992/93	1993/94	1994/95	1995/96
Canada	653,337	735,458	639,642	762,354	647,529
Japan	85,678	106,180	158,267	207,160	165,672
Mexico	28,059	46,742	40,817	31,429	27,666
EU-15	33,929	29,919	30,054	26,340	30,950
Hong Kong	15,578	20,072	25,662	25,987	25,355
Korea, Rep.	243	248	9,171	12,922	7,910
Taiwan	5,086	6,487	9,125	10,929	10,792
Singapore	2,523	2,490	3,387	6,840	5,831
Switzerland	7,579	6,503	8,997	6,139	8,199
Former Soviet Union	29	687	5,493	3,508	5,172
Others	31,150	42,519	38,050	42,956	44,251
Total	**863,191**	**997,305**	**968,665**	**1,136,564**	**979,327**

Source: U.S. Department of Commerce. 1/ Including potatoes.

United States: Top Fresh Vegetable Exports, Fiscal Years 1991/92-95/96
(Value in $1,000)

Commodity/ Destination	1991/92	1992/93	1993/94	1994/95	1995/96
Lettuce:	**126,991**	**154,874**	**126,427**	**184,044**	**132,876**
Canada	99,699	125,246	90,973	157,723	104,167
Hong Kong	7,047	10,072	11,515	9,275	10,994
Japan	5,644	4,761	6,746	4,565	3,528
Mexico	5,711	7,257	8,771	4,300	6,158
Singapore	877	1,144	1,681	2,643	2,375
Taiwan	1,144	1,263	1,468	1,752	1,685
United Kingdom	2,297	2,304	3,240	985	1,437
Others	4,572	2,827	2,033	2,801	2,532
Tomatoes:	**118,605**	**133,835**	**114,144**	**109,688**	**100,428**
Canada	112,912	116,545	103,630	100,431	94,640
Bel-Lux	23	0	0	44	2,737
Mexico	2,929	16,266	9,143	7,180	1,237
Hong Kong	747	362	717	533	334
United Kingdom	473	161	120	394	544
Leeward-Wind. Is.	115	105	75	133	84
Others	1,406	396	459	973	852

United States: Top Fresh Vegetable Exports, Fiscal Years 1990/91-94/95
(Value in $1,000)
(continued)

Commodity/ Destination	1991/92	1992/93	1993/94	1994/95	1995/96
Onions:	**61,297**	**80,313**	**85,538**	**131,872**	**83,413**
Japan	4,562	11,683	17,661	52,318	24,422
Canada	40,029	48,103	39,560	45,430	36,387
Korea, Rep.	0	0	8,010	9,748	3,778
Mexico	9,008	10,001	7,170	5,621	3,369
Taiwan	1,537	2,984	3,634	4,204	4,125
Hong Kong	1,372	1,583	2,202	2,247	1,556
United Kingdom	1,914	3,238	2,497	2,154	2,141
Caribbean Countries	744	487	1,299	1,915	1,051
Australia	207	265	442	1,345	819
Former Soviet Union	0	4	280	1,375	1,644
Others	1,924	1,965	2,783	5,515	4,121
Broccoli:	**55,882**	**69,470**	**80,197**	**91,261**	**84,418**
Canada	38,348	45,890	38,203	49,751	40,258
Japan	15,537	20,560	36,623	35,385	37,720
Hong Kong	1,241	1,148	3,103	3,046	3,063
Taiwan	86	90	782	1,353	1,722
United Kingdom	81	1,208	319	217	441
Sweden	167	107	200	107	13
Others	422	467	967	1,402	1,201
Asparagus:	**54,583**	**62,514**	**71,547**	**66,818**	**51,666**
Japan	23,685	29,584	40,777	44,500	27,674
Canada	18,496	21,592	17,193	14,163	12,488
Switzerland	6,022	4,985	7,628	3,960	6,598
United Kingdom	1,628	1,134	1,546	1,361	2,000
Germany	1,906	2,466	1,973	1,205	1,384
Australia	207	231	547	238	281
Hong Kong	204	207	405	164	42
Others	2,435	2,315	1,478	1,427	1,199
Cauliflower:	**48,508**	**49,628**	**61,799**	**73,676**	**71,619**
Japan	16,184	15,666	31,243	38,621	37,092
Canada	30,400	31,985	27,553	31,781	28,692
Hong Kong	990	1,166	1,551	2,345	2,730
Others	934	811	1,452	3,274	3,105

United States: Top Fresh Vegetable Exports, Fiscal Years 1990/91-94/95
(Value in $1,000)
(continued)

Commodity/ Destination	1991/92	1992/93	1993/94	1994/95	1995/96
Peppers:	**45,647**	**48,485**	**44,885**	**48,727**	**46,467**
Canada	43,822	45,445	42,030	47,094	45,128
Mexico	1,391	1,890	1,366	946	227
El Salvador	0	533	404	272	314
Japan	72	35	144	256	463
United Kingdom	65	139	231	38	65
Netherlands	69	116	138	11	0
Australia	72	75	127	0	0
Others	156	252	445	110	279
Celery:	**39,424**	**51,059**	**37,956**	**57,181**	**38,886**
Canada	30,232	42,391	27,856	44,776	27,740
Hong Kong	2,372	3,511	3,952	5,537	5,805
Taiwan	1,692	1,416	1,717	2,106	1,533
Singapore	684	765	790	1,706	857
United Kingdom	1,922	737	1,197	594	356
Mexico	410	921	667	416	481
Others	2,112	1,318	1,777	2,878	2,114
Garlic:	**12,433**	**13,914**	**13,403**	**10,906**	**11,164**
Mexico	1,642	1,838	3,498	4,511	2,999
Canada	4,535	4,744	3,673	2,781	2,743
Spain	615	352	752	313	1,544
Australia	764	1,332	869	705	875
United Kingdom	595	783	992	610	624
France	1,107	879	1,012	235	362
Others	3,175	3,986	2,607	1,751	2,017

Source: U.S. Department of Commerce.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
NOV 96

COMMOOITY ANO COUNTRY		QUANTITY					VALUE (1,000 OOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
TAIWAN		15,832	23,536	50,923	63,415	101,650	10,835	15,785	35,255	41,842	72,448
MEXICO		651	1,774	17,646	15,705	80,802	390	846	9,237	7,800	41,697
CANADA		6,951	6,578	34,611	38,558	78,790	5,062	4,934	26,095	29,310	62,246
HONG KONG		3,617	3,781	21,892	17,924	49,741	2,549	2,311	13,771	11,423	31,788
INDONESIA		4,387	3,305	20,418	18,604	49,455	3,097	2,313	13,515	13,691	33,534
EU 15		6,357	5,720	12,733	13,255	35,480	3,260	3,077	7,057	7,628	21,366
OTHER		35,126	47,711	75,938	96,125	166,636	20,099	26,239	45,890	56,171	104,109
Subtotal:-----		72,921	92,405	234,161	263,585	562,555	45,291	55,504	150,820	167,864	367,188
FR. PEARS(JUL)	MT										
CANADA		4,767	4,972	24,995	25,978	44,348	3,444	4,480	17,127	20,366	31,557
MEXICO		1,780	2,379	8,644	13,166	28,430	930	1,162	4,485	6,596	14,384
BRAZIL		9,533	3,526	17,690	17,126	21,747	3,744	1,531	7,626	7,594	9,522
EU 15		6,102	2,415	7,163	3,290	11,582	2,380	1,177	2,861	1,592	5,090
TAIWAN		1,553	1,566	4,025	3,008	11,438	844	1,126	2,346	2,141	6,655
OTHER		4,461	4,326	10,937	9,281	25,768	2,340	2,711	6,245	6,143	15,361
Subtotal:-----		28,195	19,185	73,453	71,847	143,313	13,682	12,187	40,691	44,434	82,570
APRICOTS(MAY)	MT										
CANADA		4	11	2,578	2,258	2,679	5	12	3,508	3,229	3,632
EU 15		0	0	353	216	431	0	0	737	238	796
MEXICO		0	4	324	182	324	0	3	289	145	289
HONG KONG		0	0	222	0	222	0	0	611	0	611
OTHER		65	0	495	269	596	43	0	702	213	773
Subtotal:-----		69	15	3,972	2,926	4,252	49	15	5,847	3,826	6,102
FR CHERRIES(MAY)	MT										
JAPAN		0	0	17,170	13,124	17,183	0	0	110,553	80,071	110,610
EU 15		814	0	6,068	6,481	9,184	599	0	9,855	14,910	12,823
CANADA		11	21	3,399	4,743	3,492	32	45	8,603	12,603	8,273
NETHERLANDS		463	0	1,949	2,308	3,233	339	0	1,701	2,335	2,712
BELGIUM-LUXEMBOU		286	0	1,909	761	2,826	208	0	1,482	765	2,804
TAIWAN		0	11	2,098	3,244	2,120	0	50	6,325	10,971	6,428
OTHER		109	11	1,659	2,449	1,714	105	42	4,227	7,859	4,364
Subtotal:-----		934	43	30,395	30,040	33,692	735	138	139,563	126,414	143,048
PEACH-NECTRN(MAY)	MT										
CANADA		18	68	39,224	40,988	40,277	31	99	40,988	40,401	42,457
MEXICO		0	222	11,674	8,782	11,693	0	114	5,159	4,498	5,164
TAIWAN		0	0	9,818	16,159	9,818	0	0	11,033	18,132	11,033
OTHER		78	103	4,435	8,353	4,746	55	112	3,774	7,846	3,958
Subtotal:-----		96	393	65,151	74,282	66,534	86	325	60,954	70,877	62,612
PLUM-PRUNES(MAY)	MT										
CANADA		33	2	13,621	21,606	14,364	58	9	19,574	19,167	20,733
TAIWAN		0	15	13,885	21,376	14,000	0	30	14,979	19,377	15,084
HONG KONG		0	0	5,427	12,027	5,459	0	0	6,088	10,838	6,119
OTHER		65	268	4,354	11,103	4,590	56	321	4,722	9,691	4,969
Subtotal:-----		98	286	37,288	66,111	38,413	113	360	45,363	59,072	46,905
FR AVOCAOOS(OCT)	MT										
EU 15		838	507	2,165	1,292	5,984	553	313	1,397	960	4,918
NETHERLANOS		572	343	1,513	980	4,178	415	214	1,016	694	3,271
JAPAN		16	5	81	5	2,784	10	3	88	3	5,866
CANADA		160	123	331	212	1,183	151	117	322	197	1,272
UNITED KINGOOM		157	125	344	162	1,034	79	77	210	127	943
OTHER		13	6	13	48	139	20	13	20	65	286
Subtotal:-----		1,027	639	2,590	1,556	10,090	733	447	1,827	1,225	12,342
FR KIWIFRUIT(OCT)	MT										
CANADA		256	419	347	747	2,339	330	402	454	773	2,939
KOREA, REPUBLIC		165	149	219	223	1,572	240	270	345	390	2,640
TAIWAN		18	0	33	0	509	17	0	42	0	831
JAPAN		4	0	11	0	338	3	0	8	0	293
OTHER		9	4	16	6	557	16	28	22	36	676
Subtotal:-----		452	572	627	976	5,315	606	700	872	1,199	7,378
FRESH GRAPES (MAY)	MT										
CANADA		7,572	5,247	94,705	81,465	103,704	10,621	10,366	106,612	101,201	118,691
HONG KONG		6,533	2,655	25,239	34,262	30,319	8,833	4,670	34,171	51,354	40,706
TAIWAN		1,998	1,395	11,533	15,467	12,897	2,421	1,760	14,695	20,163	16,002
MEXICO		2,185	2,447	6,785	7,121	12,813	2,259	2,442	6,226	6,657	12,074
OTHER		17,977	15,557	50,626	52,919	67,159	24,845	24,205	70,735	80,645	90,470
Subtotal:-----		36,265	27,302	188,887	191,234	226,892	48,980	43,443	232,438	260,020	277,943
FR STRAWBRIS(JAN)	MT										
CANADA		414	242	36,618	39,864	37,075	1,051	595	49,599	50,759	51,078
JAPAN		914	696	6,586	6,066	6,653	3,411	2,383	24,067	23,846	24,166
MEXICO		0	19	3,002	2,138	3,002	0	12	2,396	2,097	2,396
EU 15		193	41	2,691	3,164	2,696	466	154	6,321	8,941	6,343
OTHER		80	22	1,037	622	1,093	206	75	2,971	1,716	3,171
Subtotal:-----		1,601	1,020	49,934	51,854	50,518	5,134	3,219	85,354	87,360	87,154
FR ORNG INC TMPL(NOV)	MT										
CANADA		15,178	17,409	15,178	17,409	176,012	8,911	9,033	8,911	9,033	88,806
JAPAN		5,592	3,985	5,592	3,985	124,446	4,676	3,072	4,676	3,072	84,819
HONG KONG		1,566	2,104	1,566	2,104	101,408	716	1,096	716	1,096	51,892
OTHER		1,320	4,117	1,320	4,117	106,529	886	2,670	886	2,670	59,290
Subtotal:-----		23,656	27,615	23,656	27,615	508,396	15,188	15,871	15,188	15,871	284,807
FR GRPFRT(SEP)	MT										
JAPAN		16,191	12,258	34,775	23,314	242,518	10,996	8,104	23,133	15,400	144,608
EU 15		28,264	19,274	39,439	32,257	140,157	13,239	8,155	18,379	13,632	62,116
CANADA		8,204	7,253	19,396	18,211	72,102	3,196	2,803	8,499	7,672	29,421
FRANCE		8,698	6,891	12,979	10,953	54,680	4,099	2,283	6,048	4,463	24,071
NETHERLANOS		12,317	4,224	16,777	9,570	47,857	5,602	1,737	7,687	3,940	21,251
OTHER		2,079	2,656	3,606	5,346	45,174	1,016	3,090	1,932	4,714	24,090
Subtotal:-----		54,738	41,441	97,215	79,128	499,950	28,447	22,153	51,943	41,418	260,234
FR TANGERINES(NOV)	MT										
CANADA		2,411	2,628	2,411	2,628	13,556	2,111	2,220	2,111	2,220	11,526
KOREA, REPUBLIC		0	432	0	432	1,232	0	382	0	382	1,565
JAPAN		0	0	0	0	1,191	0	0	0	0	1,129
OTHER		152	279	152	279	1,140	139	182	139	182	962
Subtotal:-----		2,562	3,339	2,562	3,339	17,118	2,250	2,783	2,250	2,783	15,182

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
NOV 96

COMMOOITY ANO COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
CANNEO FRUIT											
CND PEACH&NECT(JUN)	MT										
CANADA		383	409	2,621	1,843	5,589	305	453	2,324	2,166	5,285
JAPAN		687	193	2,411	1,124	4,290	706	196	2,543	1,174	4,530
KOREA, REPUBLIC		54	55	1,334	614	2,495	36	50	1,071	523	2,031
TAIWAN		77	99	1,045	721	1,852	55	76	928	644	1,649
OTHER		573	387	4,072	3,315	7,068	499	346	3,745	3,283	6,644
Subtotal:-----		1,774	1,144	11,484	7,618	21,293	1,600	1,121	10,610	7,789	20,139
CND PEARS(JUN)	MT										
CANADA		731	279	2,582	1,547	5,669	642	305	2,260	1,663	5,086
JAPAN		27	38	331	241	623	29	51	331	231	589
OTHER		49	88	333	343	1,023	47	70	305	288	995
Subtotal:-----		806	405	3,245	2,131	7,315	718	426	2,896	2,182	6,670
CND PNEAPL(JAN)	MT										
JAPAN		83	3	1,062	407	1,130	52	9	958	425	1,021
CANADA		43	33	874	1,129	959	51	37	887	1,160	964
EU 15		32	15	810	436	855	27	18	627	388	665
GERMANY		32	15	651	188	696	27	18	495	188	532
MEXICO		64	76	181	130	184	53	83	140	129	142
OTHER		18	263	470	953	489	16	222	474	813	496
Subtotal:-----		240	390	3,397	3,054	3,618	200	368	3,086	2,915	3,288
FRT MIXTURES(JUN)	MT										
CANADA		361	766	2,552	3,691	5,531	477	820	3,310	4,400	6,954
PHILIPPINES		1,104	251	3,027	3,515	4,313	1,185	287	3,491	4,197	5,012
JAPAN		388	268	1,935	1,521	4,163	456	304	2,320	1,803	4,855
SINGAPORE		397	206	2,236	1,189	3,124	460	250	2,527	1,429	3,495
HONG KONG		212	118	1,703	1,406	2,793	233	148	1,919	1,642	3,192
OTHER		806	603	3,348	3,061	6,342	929	794	3,950	3,831	7,421
Subtotal:-----		3,268	2,212	14,800	14,383	26,266	3,740	2,604	17,516	17,302	30,930
ORIED FRUIT											
DRD RAISINS(AUG)	MT										
EU 15		3,884	3,558	24,245	23,713	56,132	6,579	5,843	38,189	39,222	91,112
UNITEO KINGOOM		1,521	1,907	11,528	11,875	27,630	2,784	3,079	17,767	20,248	44,647
JAPAN		1,541	2,292	8,021	11,180	25,038	2,405	4,387	12,577	18,853	39,409
CANADA		898	1,036	4,691	4,767	10,447	1,805	2,090	9,699	9,698	21,000
GERMANY		955	236	3,962	2,944	9,210	1,470	370	5,809	4,392	14,128
OTHER		3,081	3,010	11,166	11,496	27,007	5,753	5,343	19,938	19,585	47,596
Subtotal:-----		9,404	9,896	48,123	51,156	118,624	16,543	17,662	80,402	87,358	199,116
DRD PRUNES(AUG)	MT										
EU 15		2,198	2,377	12,803	12,233	34,588	5,234	5,345	30,471	27,114	80,958
JAPAN		990	1,204	4,849	3,740	13,183	2,291	2,778	10,996	7,981	28,583
GERMANY		471	687	3,583	3,733	11,492	1,135	1,586	8,434	8,246	26,842
ITALY		630	460	2,911	1,926	6,593	1,490	1,114	6,814	4,734	16,373
UNITED KINGOOM		226	338	1,275	1,566	5,489	508	588	2,822	2,886	11,449
CANADA		409	346	1,388	1,440	4,167	964	720	3,408	3,298	9,782
OTHER		878	1,728	3,687	6,725	9,731	1,879	3,072	7,965	12,451	20,682
Subtotal:-----		4,474	5,654	22,727	24,137	61,669	10,369	11,915	52,840	50,843	140,006
FRUIT JUICES(SSE)											
ORANGE JU CNC (OEC)	KL										
EU 15		5,185	8,057	148,694	178,160	148,694	1,709	4,152	59,417	56,966	59,417
NETHERLANOS		1,272	715	65,493	56,271	65,493	403	293	29,793	22,597	29,793
FRANCE		1,920	6,317	42,004	92,548	42,004	590	3,167	14,383	21,915	14,383
CANADA		2,175	2,037	31,993	27,786	31,993	3,374	3,494	53,116	48,285	53,116
KOREA, REPUBLIC		1,192	2,336	19,230	20,340	19,230	545	954	10,999	13,907	10,999
JAPAN		883	4,291	18,017	51,640	18,017	779	1,600	12,347	27,038	12,347
OTHER		5,789	2,991	71,989	48,856	71,989	3,400	1,423	31,600	20,834	31,600
Subtotal:-----		15,225	19,712	289,923	326,782	289,923	9,807	11,622	167,479	167,031	167,479
ORNG JU NTCNC(OEC)	KL										
CANADA		6,190	10,899	88,874	104,395	88,874	4,633	7,323	64,450	73,021	64,450
EU 15		462	2,628	40,805	32,934	40,805	302	1,665	22,965	21,197	22,965
BELGIUM-LUXEMBOU		0	2,602	23,918	21,191	23,918	0	1,646	13,154	13,507	13,154
UNITED KINGDOM		408	0	11,324	6,273	11,324	245	0	6,715	4,383	6,715
OTHER		2,649	1,512	23,107	23,227	23,107	1,935	1,754	16,933	19,518	16,933
Subtotal:-----		9,301	15,038	152,786	160,556	152,786	6,870	10,742	104,348	113,737	104,348
GRPFRT JU CNC (OEC)	KL										
EU 15		1,425	1,474	26,579	31,141	26,579	983	861	16,416	17,168	16,416
NETHERLANDS		86	472	15,777	9,802	15,777	123	338	11,020	6,772	11,020
JAPAN		725	1,132	14,625	20,693	14,625	518	717	14,377	17,238	14,377
ARGENTINA		96	80	4,496	440	4,496	22	58	1,371	333	1,371
GERMANY		459	125	3,910	1,539	3,910	330	85	1,953	919	1,953
ISRAEL		201	99	3,553	5,477	3,553	202	27	1,257	1,527	1,257
OTHER		567	528	5,617	7,759	5,617	509	633	7,257	8,282	7,257
Subtotal:-----		3,014	3,313	54,870	65,508	54,870	2,235	2,295	40,678	44,549	40,678
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
JAPAN		2	0	2	0	6,276	13	0	13	0	27,674
CANADA		79	129	148	228	4,567	223	379	443	646	12,488
SWITZERLAND		0	0	0	0	1,988	0	0	0	0	6,598
FR ASPARAGUS(OCT)	MT										
EU 15		48	25	91	26	1,304	74	54	148	58	4,194
OTHER		4	1	13	7	209	6	3	24	9	713
Subtotal:-----		133	155	252	261	14,344	316	436	629	713	51,666
FR ONIONS(OCT)	MT										
CANADA		5,814	8,516	12,113	15,618	103,048	2,696	3,034	4,811	5,501	36,260
JAPAN		16,198	5,387	26,364	16,236	79,476	3,675	1,330	5,829	3,895	19,360
OTHER		7,313	5,577	13,600	22,691	41,923	2,177	1,808	4,169	8,384	14,119
Subtotal:-----		29,325	19,480	52,077	54,546	224,447	8,548	6,172	14,810	17,780	69,739
CANNEO VEGETABLES											
CND SWT CORN(AUG)	MT										
EU 15		4,370	4,021	14,876	11,697	46,309	3,248	2,709	11,608	7,976	35,341
JAPAN		3,754	6,050	11,642	19,715	45,654	2,866	5,086	9,194	16,841	36,581
TAIWAN		1,726	1,500	5,828	5,785	21,174	1,637	1,481	5,148	5,190	18,564
GERMANY		1,425	1,161	6,540	2,208	18,415	1,094	793	5,194	1,555	14,218
HONG KONG		1,733	3,101	5,247	6,805	17,451	1,421	2,660	4,331	5,866	14,333
UNITED KINGOOM		1,833	1,062	4,181	4,341	13,042	1,343	613	3,303	2,636	10,029
OTHER		2,608	4,690	11,228	14,180	35,753	2,018	4,501	9,217	13,100	29,581
Subtotal:-----		14,190	19,361	48,822	58,182	166,341	11,190	16,438	39,499	48,972	134,401

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
NOV 96

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TOT LAST YR	QUANTITY YR TOT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE (1,000 DOLLARS) CURR MO CURR YR	VALUE (1,000 DOLLARS) YR TOT LAST YR	VALUE (1,000 DOLLARS) YR TOT CURR YR	VALUE (1,000 DOLLARS) LAST YEAR
CND TOM PAS(JUL)	MT										
CANADA		3,434	3,688	24,074	28,377	45,326	2,841	2,713	20,079	20,732	37,231
JAPAN		1,380	1,103	4,316	4,355	12,354	1,132	818	3,544	3,489	10,120
EU-15		42	373	62	2,689	6,190	33	296	48	1,737	4,313
KOREA, REPUBLIC		751	537	2,407	1,782	5,908	605	456	2,214	1,446	5,421
ITALY		0	0	0	1,883	5,255	0	0	0	1,055	3,369
OTHER		4,131	3,831	9,388	15,771	17,863	2,178	2,603	6,110	10,673	13,681
Subtotal:-----		9,738	9,530	40,247	52,975	87,641	6,787	6,886	31,995	38,077	70,767
CND TOM SAUCE(JUL)	MT										
CANADA		3,506	4,794	20,981	25,759	54,007	3,148	4,436	19,896	23,251	49,485
JAPAN		676	582	2,251	2,356	6,116	727	606	2,283	2,817	6,143
EU-15		440	278	1,521	2,327	5,305	334	436	1,800	2,866	5,929
OTHER		1,105	1,093	5,740	5,992	14,992	1,127	1,118	5,953	5,671	15,589
Subtotal:-----		5,728	6,747	30,493	36,434	80,420	5,337	6,596	29,933	34,606	77,147
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		4,159	4,244	16,335	16,533	40,120	3,729	3,742	14,759	15,292	35,756
HONG KONG		313	613	1,448	2,429	3,872	220	394	1,128	1,649	2,878
CANADA		166	85	976	1,094	3,323	146	72	849	917	2,852
OTHER		912	825	6,017	4,148	11,658	711	734	4,542	3,396	9,012
Subtotal:-----		5,550	5,767	24,776	24,204	58,972	4,807	4,941	21,278	21,253	50,498
FZN F FRY(JUL)	MT										
JAPAN		16,566	18,165	72,454	77,678	183,767	12,189	13,489	52,870	57,343	135,152
KOREA, REPUBLIC		1,579	2,528	7,184	11,038	21,956	1,167	1,784	5,309	7,866	15,721
HONG KONG		1,521	2,396	9,463	11,510	21,136	1,035	1,614	6,257	7,659	13,999
OTHER		9,373	10,461	55,580	54,307	123,078	7,118	7,906	42,113	40,485	91,407
Subtotal:-----		29,040	33,550	144,681	154,533	349,937	21,510	24,793	106,550	113,353	256,280
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
INDIA		1,062	1,421	3,714	6,506	6,323	2,576	3,539	8,979	16,189	15,128
JAPAN		461	92	2,972	548	4,669	1,573	285	7,914	1,401	12,500
EU-15		617	830	2,006	4,186	3,457	1,515	2,005	4,853	9,507	8,031
GERMANY		176	178	746	1,265	1,178	419	444	1,824	3,005	2,883
OTHER		505	657	1,267	2,893	2,331	1,210	1,583	3,127	6,923	5,655
Subtotal:-----		2,645	3,000	9,959	14,133	16,779	6,874	7,411	24,873	34,021	41,315
ALMND SH/PREP(JUL)	MT										
EU-15		10,712	8,833	69,839	72,374	170,076	31,741	44,342	240,860	334,585	559,077
GERMANY		3,854	3,478	26,591	28,131	62,871	12,926	16,876	98,634	124,561	211,429
JAPAN		3,889	1,911	14,027	9,400	40,454	9,701	11,035	38,877	50,493	93,264
NETHERLANDS		1,299	760	8,955	7,468	20,915	2,841	4,019	23,796	33,460	53,497
FRANCE		1,223	1,342	5,858	7,472	18,587	4,307	7,110	20,510	35,542	57,972
CANADA		1,781	1,005	7,944	4,568	16,726	4,116	4,826	20,088	21,132	41,184
OTHER		7,734	3,408	26,691	18,499	54,490	15,119	17,825	61,933	86,505	135,794
Subtotal:-----		24,117	15,157	118,498	104,840	281,745	60,677	78,028	361,758	492,715	829,318
WALNUTS SH(AUG)	MT										
JAPAN		1,250	1,190	2,610	2,803	7,676	4,547	5,410	9,123	12,815	31,804
EU-15		1,235	872	2,648	2,766	5,116	2,219	1,436	5,931	6,404	11,865
CANADA		250	292	850	1,204	2,110	907	1,033	3,094	4,009	7,678
SPAIN		472	361	1,045	1,142	1,794	781	548	2,018	2,393	3,998
ISRAEL		270	158	517	515	1,459	1,270	815	2,262	2,642	6,776
OTHER		792	1,104	1,455	2,075	3,931	2,177	2,687	4,272	5,957	12,495
Subtotal:-----		3,796	3,615	8,080	9,362	20,291	11,120	11,381	24,682	31,826	70,618
WALNUTS UNSH(AUG)	MT										
EU-15		14,137	7,953	45,277	46,349	48,199	27,125	16,589	86,908	100,043	92,596
GERMANY		3,501	1,252	14,063	11,708	14,603	6,558	2,705	26,931	25,687	27,908
SPAIN		5,008	4,583	12,956	14,139	13,877	9,445	9,208	24,003	28,685	25,912
ITALY		3,612	1,717	9,057	9,967	9,842	6,915	3,856	17,488	22,124	19,021
NETHERLANDS		882	165	3,857	6,401	4,135	1,765	347	7,720	14,369	8,223
OTHER		2,991	2,196	5,492	6,334	9,266	6,044	4,473	10,991	13,258	17,962
Subtotal:-----		17,128	10,149	50,769	52,684	57,464	33,169	21,061	97,899	113,300	110,558
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		328	484	485	524	2,168	1,702	1,696	2,501	1,935	11,226
CANADA		123	180	277	403	1,397	783	1,022	1,744	2,616	9,232
EU-15		139	115	235	286	628	765	698	1,265	2,006	3,253
JAPAN		0	20	0	20	326	0	66	0	66	1,264
OTHER		92	5	290	87	1,006	345	23	1,190	765	4,951
Subtotal:-----		682	804	1,288	1,320	5,524	3,596	3,505	6,700	7,388	29,926
HOP EXTRACT(SEP)	MT										
EU-15		258	201	408	376	1,438	3,293	2,778	5,991	5,589	21,474
MEXICO		130	89	155	115	489	3,694	1,790	3,985	2,206	13,202
GERMANY		125	33	158	94	467	1,684	484	2,193	1,227	6,539
COLOMBIA		0	0	0	59	345	0	0	0	1,781	3,144
BRAZIL		10	58	67	175	313	38	606	771	2,145	3,624
UNITED KINGDOM		73	33	119	45	300	847	388	1,410	607	3,884
OTHER		33	88	124	200	945	678	909	2,122	2,628	15,361
Subtotal:-----		432	436	755	925	3,530	7,703	6,083	12,869	14,349	56,806
HOPS,NSPF(SEP)	MT										
EU-15		214	106	1,263	501	2,279	1,234	533	6,177	2,511	11,478
GERMANY		116	0	949	263	1,604	659	0	4,317	1,127	7,204
UNITED KINGDOM		99	82	269	214	605	574	450	1,535	1,300	3,875
MEXICO		74	0	74	0	342	265	0	265	0	2,129
OTHER		26	21	45	76	515	319	308	553	898	4,485
Subtotal:-----		315	127	1,381	577	3,135	1,818	842	6,994	3,408	18,092
WINE											
GRAPE WINE(JAN)	KL										
EU-15		3,468	4,392	50,627	68,000	55,735	6,655	8,536	83,889	134,606	93,678
UNITED KINGDOM		2,080	2,532	29,494	35,479	32,530	4,145	5,288	52,062	75,116	58,288
CANADA		2,964	2,744	25,336	30,316	27,167	6,191	7,374	46,686	61,592	50,421
JAPAN		1,611	1,394	15,271	15,446	16,441	3,125	2,381	26,207	26,340	28,072
SWITZERLAND		740	673	7,064	7,557	8,250	1,157	1,228	11,374	12,422	13,023
OTHER		2,257	3,119	20,722	26,401	23,481	3,559	5,049	30,708	42,502	35,122
Subtotal:-----		11,040	12,322	119,019	147,722	131,073	20,686	24,568	198,863	277,463	220,316

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
NOV 96

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TDT LAST YR	QUANTITY YR TDT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TDT LAST YR	VALUE YR TDT CURR YR	VALUE LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		0	0	11,332	18,540	49,027	0	0	15,086	17,258	52,798
CANADA		9,692	13,130	37,885	44,798	71,873	3,873	4,654	12,412	14,490	27,528
OTHER		0	0	9,619	9,186	47,829	0	0	5,532	3,021	22,624
Subtotal:-----		9,692	13,130	58,837	72,524	168,729	3,873	4,654	33,030	34,769	102,950
FR PEARS(JUL)	MT										
CHILE		0	0	18	90	33,339	0	0	6	28	15,642
ARGENTINA		0	0	0	0	15,637	0	0	0	0	10,261
OTHER		730	747	1,226	1,062	8,366	2,224	1,937	3,608	2,772	8,109
Subtotal:-----		730	747	1,245	1,152	57,341	2,224	1,937	3,614	2,800	34,013
APRICOT (MAY)	MT										
CHILE		6	62	6	62	1,344	26	114	26	114	1,604
NEW ZEALAND		0	0	0	0	310	0	0	0	0	852
OTHER		0	14	6	90	16	0	93	9	253	22
Subtotal:-----		6	76	12	152	1,670	26	207	35	366	2,477
PEACH-NEC(MAY)	MT										
CHILE		169	625	169	633	40,677	184	724	184	739	30,485
OTHER		0	0	232	455	392	0	0	221	411	416
Subtotal:-----		169	625	401	1,087	41,069	184	724	405	1,150	30,901
PLUM-PRUNE(MAY)	MT										
CHILE		0	30	2	310	19,665	0	66	6	378	16,487
OTHER		29	27	162	190	214	30	30	232	239	310
Subtotal:-----		29	57	165	499	19,879	30	96	239	617	16,797
FRESH GRAPES (MAY)	MT										
CHILE		0	68	1,600	4,276	273,685	0	112	1,201	4,184	250,990
MEXICO		0	0	80,492	59,956	80,569	0	0	82,696	86,724	82,797
OTHER		274	204	1,933	3,309	5,250	408	176	1,227	1,186	4,141
Subtotal:-----		274	272	84,024	67,540	359,503	408	288	85,124	92,094	337,929
FR RASPBRY(JAN)	MT										
CANADA		0	0	6,362	4,624	6,362	0	0	11,568	9,071	11,568
OTHER		126	119	1,326	1,442	1,664	605	368	4,697	4,333	5,695
Subtotal:-----		126	119	7,688	6,065	8,026	605	368	16,265	13,404	17,263
FR STRAWBRIS(JAN)	MT										
MEXICO		369	466	25,187	28,334	25,894	480	597	42,593	51,229	43,626
OTHER		306	335	462	813	790	995	1,147	1,338	1,773	2,077
Subtotal:-----		674	801	25,649	29,147	26,684	1,475	1,743	43,932	53,002	45,702
FR BANANA(JAN)	MT										
COSTA RICA		76,582	96,364	879,953	887,148	958,125	24,484	30,241	281,515	283,799	306,323
ECUADOR		67,323	58,089	866,342	777,371	931,548	18,040	16,315	238,589	217,097	256,231
OTHER		149,348	147,363	1,633,868	1,824,819	1,774,148	39,969	40,118	462,322	513,250	499,891
Subtotal:-----		293,252	301,815	3,380,162	3,489,338	3,663,821	82,493	86,674	982,426	1,014,146	1,062,445
FR MANGO(JAN)	MT										
MEXICO		0	0	114,746	139,258	114,746	0	0	100,600	80,580	100,600
OTHER		2,193	4,077	25,615	29,104	27,647	3,322	3,900	20,774	22,526	23,031
Subtotal:-----		2,193	4,077	140,361	168,362	142,393	3,322	3,900	121,374	103,106	123,631
FR PINAPLE(JAN)	MT										
COSTA RICA		6,145	8,050	71,246	73,850	76,991	2,328	3,490	25,447	29,579	27,389
HONDURAS		3,301	1,809	30,996	26,230	33,148	523	500	8,384	7,292	8,972
OTHER		793	1,195	11,702	19,743	12,525	247	396	2,983	6,340	3,234
Subtotal:-----		10,239	11,053	113,944	119,823	122,664	3,099	4,386	36,814	43,211	39,596
FR CANTLPE(MAY)	MT										
MEXICO		11,473	11,314	41,278	54,715	130,065	3,753	4,590	13,305	16,680	39,141
COSTA RICA		0	0	5,291	3,210	61,327	0	0	2,133	1,217	28,640
GUATEMALA		5,286	3,093	10,008	7,833	55,075	1,567	1,043	3,086	2,861	15,890
OTHER		1,508	1,145	4,641	6,357	77,095	371	355	1,135	1,533	20,169
Subtotal:-----		18,267	15,553	61,218	72,115	323,563	5,692	5,987	19,659	22,290	103,840
FR MELON,OT(MAY)	MT										
MEXICO		9,263	4,687	25,292	14,410	55,740	2,642	1,682	8,498	4,868	19,311
COSTA RICA		0	0	970	590	17,027	0	0	391	210	7,408
OTHER		1,215	131	5,054	4,059	48,588	356	51	1,346	1,670	17,302
Subtotal:-----		10,478	4,818	31,315	19,059	121,354	2,998	1,732	10,235	6,749	44,022
FR ORANGES(NOV)	MT										
AUSTRALIA		0	0	0	0	11,550	0	0	0	0	17,652
OTHER		127	189	127	189	11,625	44	75	44	75	4,756
Subtotal:-----		127	189	127	189	23,175	44	75	44	75	22,408
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU-15		1,346	1,435	29,888	27,847	32,925	1,502	1,465	29,919	29,938	33,445
SPAIN		1,343	1,431	29,855	27,801	32,892	1,494	1,451	29,810	29,803	33,336
CHINA, PEOPLES R		178	1,670	12,137	29,599	12,593	171	1,701	11,166	30,696	11,638
OTHER		101	158	2,073	2,632	2,196	130	198	2,381	3,106	2,520
Subtotal:-----		1,625	3,280	44,098	60,078	47,714	1,803	3,365	43,466	63,736	47,603
CND BLK OLV(NOV)	MT										
EU-15		1,283	979	1,283	979	13,352	2,896	2,303	2,896	2,303	31,610
SPAIN		1,144	821	1,144	821	11,459	2,589	1,855	2,589	1,855	26,739
MOROCCO		401	385	401	385	6,347	879	805	879	805	14,563
OTHER		6	24	6	24	162	11	59	11	59	372
Subtotal:-----		1,690	1,388	1,690	1,388	19,861	3,786	3,168	3,786	3,168	46,545
CND GRN OLV(NOV)	MT										
EU-15		3,287	3,573	3,287	3,573	32,529	10,021	9,838	10,021	9,838	94,375
SPAIN		3,234	3,535	3,234	3,535	32,305	9,912	9,751	9,912	9,751	93,667
OTHER		115	152	115	152	1,489	226	253	226	253	2,753
Subtotal:-----		3,402	3,726	3,402	3,726	34,018	10,246	10,091	10,246	10,091	97,128
CND PEACH(JUN)	MT										
EU-15		1,043	3,029	4,970	12,723	10,568	713	1,969	3,143	8,267	7,087
GREECE		1,040	2,302	4,920	10,981	10,489	703	1,476	3,018	6,970	6,898
OTHER		437	493	2,357	2,255	3,532	301	303	1,650	1,573	2,539
Subtotal:-----		1,481	3,521	7,327	14,977	14,100	1,015	2,272	4,793	9,840	9,626
CND PINAPLE(JAN)	MT										
PHILIPPINES		12,902	8,224	115,911	115,743	124,605	8,087	5,438	66,250	75,224	72,287
THAILAND		2,530	2,433	96,234	73,526	99,474	1,710	1,648	51,110	51,866	53,336
OTHER		11,506	6,269	66,182	85,723	71,416	4,787	4,864	27,926	55,672	31,492
Subtotal:-----		26,939	16,926	278,327	274,992	295,495	14,585	11,950	145,286	182,763	157,115
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		2,373	1,421	5,956	4,566	14,091	5,056	3,905	11,657	11,746	28,562
OTHER		50	19	259	217	533	201	43	896	712	1,576
Subtotal:-----		2,423	1,440	6,215	4,784	14,625	5,257	3,948	12,553	12,458	30,138

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
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COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
DATES(SEP)	MT										
PAKISTAN		242	191	377	239	3,172	228	177	341	218	3,170
CHINA, PEOPLES R		33	28	40	68	620	55	50	73	95	1,103
ISRAEL		195	0	265	18	522	196	0	404	47	1,088
OTHER		41	45	206	162	338	85	73	376	360	607
Subtotal:-----		512	264	886	487	4,652	564	301	1,193	721	5,968
DRD FIG(SEP)	MT										
EU-15		134	279	821	999	823	308	637	1,911	2,308	1,919
GREECE		131	262	802	973	802	289	547	1,849	2,182	1,849
TURKEY		312	122	362	304	678	686	273	800	685	1,239
MEXICO		19	40	224	286	307	53	124	716	735	916
OTHER		2	0	4	4	45	4	0	9	4	73
Subtotal:-----		467	440	1,411	1,593	1,853	1,050	1,034	3,436	3,732	4,147
DRD RAISIN(AUG)	MT										
MEXICO		1,012	680	4,306	4,447	8,370	900	647	3,551	4,121	7,796
CHILE		29	183	702	876	1,724	33	221	814	1,032	2,006
OTHER		199	119	547	279	2,013	209	133	553	317	2,045
Subtotal:-----		1,240	982	5,554	5,602	12,107	1,142	1,001	4,918	5,475	11,847
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
ARGENTINA		0	6,515	127,746	109,478	314,057	0	1,513	45,944	36,448	110,229
EU-15		27,216	42,604	63,443	105,946	219,220	11,037	14,169	26,007	38,286	92,527
GERMANY		14,977	31,994	34,838	75,666	159,519	6,100	10,673	14,506	27,213	65,955
OTHER		30,703	49,891	124,015	159,578	305,039	13,510	15,836	44,577	59,806	114,986
Subtotal:-----		57,919	99,011	315,204	375,002	838,316	24,547	31,518	116,527	134,540	317,741
FCOJ(DEC)	KL										
BRAZIL		80,641	124,718	390,548	703,184	390,548	18,786	27,866	82,477	173,085	82,477
MEXICO		6,461	14,442	248,924	162,610	248,924	1,615	3,807	59,483	47,432	59,483
OTHER		4,733	5,224	86,074	101,815	86,074	1,035	1,104	20,438	30,355	20,438
Subtotal:-----		91,835	144,383	725,546	967,609	725,546	21,436	32,778	162,397	250,872	162,397
GRAPE JU(JAN)	KL										
ARGENTINA		9,738	8,703	41,422	162,062	51,315	2,433	2,696	10,361	44,333	12,785
CHILE		2,270	602	12,338	25,493	14,711	618	268	3,486	7,820	4,076
OTHER		1,070	5,614	21,256	25,418	22,740	641	2,351	8,644	11,753	9,260
Subtotal:-----		13,078	14,918	75,017	212,973	88,766	3,692	5,315	22,491	63,906	26,121
PNEAPL JUCN(JAN)	KL										
THAILAND		2,949	3,490	91,140	95,015	97,211	696	1,167	16,421	31,579	18,019
PHILIPPINES		10,233	6,831	100,838	90,741	114,084	1,609	1,550	14,137	15,384	16,167
OTHER		3,812	4,550	22,334	43,062	26,319	1,047	1,557	5,359	13,742	6,517
Subtotal:-----		16,993	14,872	214,311	228,818	237,613	3,351	4,274	35,917	60,705	40,703
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		3,794	2,113	48,494	34,436	51,400	1,241	647	15,106	10,675	16,003
THAILAND		2,498	493	12,562	12,911	18,013	703	348	8,840	6,915	10,398
OTHER		3,763	107	14,752	9,834	14,794	524	74	2,597	2,010	2,635
Subtotal:-----		10,056	2,714	75,808	57,181	84,208	2,468	1,070	26,543	19,599	29,036
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		499	121	26,227	20,599	26,227	298	93	24,480	16,703	24,480
OTHER		13	43	701	283	701	68	87	2,239	825	2,239
Subtotal:-----		512	164	26,928	20,882	26,928	366	180	26,719	17,527	26,719
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		1,091	668	1,206	746	18,611	1,006	705	1,147	777	20,030
OTHER		8	49	28	155	692	10	42	29	133	623
Subtotal:-----		1,098	716	1,234	901	19,302	1,016	747	1,175	909	20,653
FR CARROT(OCT)	MT										
CANADA		12,283	10,950	23,465	21,435	67,654	3,038	2,666	5,959	4,917	18,424
MEXICO		2,215	2,349	3,178	4,125	33,599	324	374	478	716	5,624
OTHER		15	14	17	43	690	4	4	6	15	250
Subtotal:-----		14,512	13,313	26,660	25,603	101,943	3,366	3,044	6,443	5,648	24,298
FR CABBAGE(OCT)	MT										
CANADA		2,677	1,968	6,738	3,886	28,206	672	420	1,784	804	7,631
MEXICO		1,664	609	2,735	1,080	13,301	294	92	472	168	2,358
OTHER		0	0	0	1	22	0	2	1	4	18
Subtotal:-----		4,340	2,577	9,474	4,967	41,529	966	514	2,257	977	10,007
FR CELERY(OCT)	MT										
MEXICO		1,263	238	1,263	238	23,076	351	46	351	46	4,797
OTHER		56	86	399	837	3,416	29	48	116	272	1,139
Subtotal:-----		1,318	324	1,661	1,075	26,492	380	93	467	317	5,936
FR CUCMBR(OCT	MT										
MEXICO		31,858	36,754	37,791	46,142	277,516	7,837	11,029	9,070	14,574	106,236
OTHER		321	302	782	804	18,391	239	419	808	1,068	9,372
Subtotal:-----		32,179	37,056	38,574	46,946	295,907	8,077	11,448	9,879	15,642	115,608
FR CAULFLWR(OCT)	MT										
CANADA		65	61	387	211	5,990	16	21	117	93	2,378
OTHER		0	0	0	2	1,012	0	0	0	3	405
Subtotal:-----		65	61	387	212	7,003	16	21	117	96	2,783
FR GARLIC(OCT)	MT										
MEXICO		9	48	92	169	16,715	13	71	85	344	19,521
OTHER		447	169	899	675	5,723	531	281	1,019	926	7,691
Subtotal:-----		456	217	991	844	22,438	544	352	1,104	1,271	27,212
FR ONION(OCT)	MT										
MEXICO		9,710	10,278	13,337	15,635	219,900	15,793	11,780	20,478	18,796	126,837
OTHER		1,978	4,283	4,482	8,727	45,365	807	1,386	1,861	2,930	18,842
Subtotal:-----		11,688	14,561	17,819	24,362	265,265	16,599	13,166	22,339	21,727	145,679
FR PEPPERS(OCT)	MT										
MEXICO		12,923	13,191	24,174	25,048	243,766	8,444	8,296	13,587	13,091	140,762
EU-15		1,454	2,488	2,806	4,374	16,915	4,789	5,551	7,195	8,824	42,732
NETHERLANDS		1,405	2,445	2,728	4,303	16,601	4,617	5,446	6,969	8,665	41,735
OTHER		596	406	1,564	1,515	8,876	1,404	1,039	2,467	2,230	15,908
Subtotal:-----		14,973	16,085	28,543	30,937	269,558	14,638	14,886	23,250	24,145	199,403
FR SEED POT(OCT)	MT										
CANADA		5,971	3,438	6,258	5,847	136,546	887	678	960	1,493	26,550
OTHER		0	0	0	0	89	0	0	4	0	58
Subtotal:-----		5,971	3,438	6,258	5,847	136,635	887	678	963	1,493	26,607
FR TBL POT(OCT)	MT										
CANADA		34,266	20,905	70,956	43,690	353,273	7,277	3,723	13,825	8,282	71,973
OTHER		0	0	0	0	0	0	0	0	0	0
Subtotal:-----		34,266	20,905	70,956	43,690	353,273	7,277	3,723	13,825	8,282	71,973

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
NOV 96

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FR TOMATO(OCT)	MT										
MEXICO		32,023	34,646	59,710	67,796	677,452	18,674	19,934	34,062	38,525	595,875
OTHER		1,734	3,450	3,784	7,438	47,170	3,283	6,474	6,600	13,212	84,102
Subtotal:-----		33,757	38,096	63,494	75,233	724,621	21,957	26,407	40,663	51,737	679,977
FR ASPARG(OCT)	MT										
MEXICO		491	638	686	727	18,317	1,084	1,588	1,469	1,784	32,841
PERU		1,791	2,025	3,456	3,685	10,048	3,548	3,328	6,828	6,150	18,802
OTHER		1,181	1,186	2,628	3,350	4,969	1,343	1,505	2,841	3,733	6,513
Subtotal:-----		3,463	3,849	6,769	7,762	33,333	5,976	6,420	11,138	11,667	58,156
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		0	0	3	0	7,987	0	0	2	0	5,149
ISRAEL		512	821	1,958	2,780	3,549	368	809	1,620	2,399	2,929
CHILE		98	30	1,946	146	2,349	69	26	1,443	107	1,810
OTHER		72	204	669	513	1,351	81	208	667	533	1,373
Subtotal:-----		682	1,055	4,576	3,440	15,236	518	1,043	3,731	3,038	11,261
CND TOM SAUCE(JUL)	MT										
EU 15		608	563	2,548	2,735	6,605	1,081	360	2,936	3,965	9,995
CANADA		277	437	5,204	1,864	10,790	228	467	3,577	1,729	7,386
SPAIN		239	0	499	850	2,038	824	0	1,713	2,918	7,081
OTHER		417	310	3,662	1,442	6,222	310	270	3,435	1,899	5,395
Subtotal:-----		1,302	1,310	11,414	6,042	23,616	1,619	1,097	9,948	7,593	22,776
CND TOMATO(JUL)	MT										
ISRAEL		1,382	160	14,027	2,794	19,674	843	91	8,731	1,531	11,947
EU 15		1,167	4,806	7,439	14,175	20,409	320	1,985	1,987	5,163	5,747
CHILE		500	274	6,516	2,964	11,725	262	121	2,963	1,439	5,569
ITALY		1,167	4,748	7,255	13,345	19,475	320	1,964	1,920	4,911	5,508
OTHER		685	457	1,525	2,921	6,871	338	247	713	1,473	3,479
Subtotal:-----		3,734	5,697	29,507	22,854	58,679	1,763	2,444	14,394	9,606	26,743
CND MSHROOM(JUL)	MT										
CHINA, PEOPLES R		852	3,112	10,627	14,654	23,912	1,748	4,816	23,003	23,108	46,720
INDONESIA		1,404	1,130	6,261	6,104	14,579	3,365	2,457	16,093	13,516	35,124
OTHER		1,624	1,576	8,673	7,092	18,725	3,889	3,310	20,895	15,152	43,290
Subtotal:-----		3,880	5,818	25,562	27,850	57,215	9,002	10,583	59,991	51,775	125,134
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		15,558	12,689	39,490	36,509	160,546	8,338	8,100	21,665	22,434	86,277
GUATEMALA		2,346	2,072	8,123	7,346	22,464	1,870	1,524	6,201	5,335	16,479
OTHER		0	18	23	19	67	0	21	9	23	48
Subtotal:-----		17,904	14,779	47,636	43,874	183,077	10,208	9,645	27,875	27,792	102,804
FZN CAULFLR(SEP)	MT										
MEXICO		2,937	2,319	6,386	6,122	16,387	1,683	1,832	3,886	4,507	10,062
OTHER		240	198	583	473	1,847	137	181	390	361	1,331
Subtotal:-----		3,177	2,517	6,969	6,595	18,234	1,820	2,013	4,276	4,868	11,393
FZN POTATO(SEP)	MT										
CANADA		13,554	21,864	38,685	56,211	178,331	8,095	13,205	23,477	34,387	109,287
OTHER		3	44	27	92	283	9	49	48	124	407
Subtotal:-----		13,557	21,909	38,712	56,303	178,614	8,104	13,254	23,525	34,510	109,693
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
TURKEY		30	39	135	44	230	78	153	351	177	609
OTHER		0	0	8	0	54	0	2	12	2	162
Subtotal:-----		30	40	143	45	284	78	154	363	179	771
CASHEW NUT(AUG)	MT										
INDIA		2,117	2,316	10,166	12,034	27,355	10,677	11,749	48,226	62,123	134,902
BRAZIL		1,837	2,042	7,022	8,584	25,018	9,248	9,358	34,538	40,125	121,183
OTHER		405	549	1,669	2,744	5,085	1,986	2,357	7,624	11,870	22,976
Subtotal:-----		4,359	4,908	18,855	23,362	57,458	21,911	23,464	90,388	114,118	279,061
FILBERTS(AUG)	MT										
TURKEY		396	545	1,762	1,026	4,395	1,514	2,043	6,444	3,545	14,816
OTHER		166	111	543	142	658	213	152	683	294	1,142
Subtotal:-----		563	656	2,306	1,168	5,053	1,727	2,195	7,127	3,839	15,958
PECANS NSH(SEP)	MT										
MEXICO		4,665	4,850	6,665	6,020	20,122	7,330	4,929	9,874	5,983	27,608
OTHER		0	0	0	0	0	0	0	0	0	0
Subtotal:-----		4,665	4,850	6,665	6,020	20,122	7,330	4,929	9,874	5,983	27,608
WINES											
CHMP&SPRK WN(JAN)	KL										
EU 15		5,276	4,602	27,859	27,874	29,944	48,422	46,175	268,757	293,618	288,832
FRANCE		1,651	1,547	9,204	10,093	9,930	32,204	30,937	186,856	207,296	200,949
ITALY		1,944	1,495	10,649	9,984	11,200	9,239	7,614	48,553	51,452	50,900
OTHER		61	34	256	205	277	223	121	967	736	1,051
Subtotal:-----		5,337	4,636	28,116	28,080	30,222	48,645	46,296	269,724	294,354	289,884
FT&VERM WN(JAN)	KL										
EU 15		1,112	1,607	12,524	14,067	13,386	4,825	7,419	54,717	69,086	58,756
PORTUGAL		164	274	1,641	2,454	1,761	1,651	3,069	17,240	29,041	18,828
ITALY		563	894	6,834	7,716	7,204	1,301	2,511	16,661	20,426	17,526
SPAIN		279	346	3,167	2,684	3,466	1,055	1,416	15,489	12,878	16,754
OTHER		48	65	352	343	381	218	310	1,464	1,705	1,568
Subtotal:-----		1,160	1,673	12,875	14,410	13,766	5,043	7,729	56,181	70,791	60,324
OTH GP WINE(JAN)	KL										
EU 15		18,751	20,632	163,974	196,097	177,249	76,083	83,367	608,254	735,980	662,411
FRANCE		7,654	9,081	55,817	74,730	60,100	44,342	44,897	313,324	355,712	340,241
ITALY		8,627	8,622	87,216	98,867	94,502	23,252	27,252	224,644	298,813	245,296
OTHER		5,144	9,690	46,342	81,499	51,104	12,530	24,099	117,146	195,648	128,815
Subtotal:-----		23,895	30,321	210,316	277,596	228,353	88,613	107,465	725,401	931,627	791,226
OTH WN PROD(JAN)	KL										
JAPAN		170	164	1,512	1,584	1,599	880	898	7,076	7,244	7,428
EU 15		605	525	4,785	4,971	5,180	627	608	6,390	5,921	6,959
UNITED KINGDOM		246	84	2,533	2,586	2,711	242	78	3,140	2,524	3,340
OTHER		121	253	1,743	2,090	1,998	178	355	2,518	2,677	2,857
Subtotal:-----		897	941	8,040	8,645	8,777	1,686	1,860	15,984	15,841	17,244
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	6,774	6,776	92,688	113,402	99,585
ECUADOR		0	0	0	0	0	2,638	3,509	25,390	34,179	27,952
OTHER		0	0	0	0	0	975	914	23,604	21,728	24,604
Subtotal:-----		0	0	0	0	0	10,387	11,199	141,682	169,309	152,141
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	10,469	9,567	98,967	111,103	109,471
OTHER		0	0	0	0	0	288	419	3,569	5,007	3,995
Subtotal:-----		0	0	0	0	0	10,757	9,987	102,536	116,110	113,466

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